

## FINANCIAL AID SERIES

<b>Code No.</b>	<b>Class Title</b>	<b>Occ. Area</b>	<b>Work Area</b>	<b>Prob. Period</b>	<b>Effective Date</b>
0052	Financial Aid Representative	04	078	6 mo.	03/15/20
0053	Financial Aid Coordinator	03	078	12 mo.	03/15/20
0054	Financial Aid Manager	03	078	12 mo.	03/15/20

### *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 Representative 0052**

Employees at this level serve as the initial contact for institutional financial aid inquiries. They counsel, advise, and direct inquiries for applicants and recipients of student financial aid. They work under general supervision from a designated supervisor.

A Financial Aid Representative typically:

1. counsels and advises on financial aid programs, processes, requirements, policies and procedures;
2. directs correspondences and/or individuals to university-wide resources as appropriate (billing, scholarship, student employments, housing, etc.);
3. ensures that financial aid support and information is disseminated to prospective, incoming, and current students;
4. assists in reviewing all forms received and preparing necessary forms including assisting with the completion of the online financial aid application process;
5. interviews prospective, incoming, and current students regarding need for and participation in student financial aid programs;
6. assists in or individually determines an applicant's basic eligibility for financial aid programs;
7. assists in the evaluation process for appeals;
8. identifies 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);
9. assists with entering, updating, and processing award notifications;

10. performs administrative duties such as maintaining student accounts and/or records, receiving and forwarding correspondence, preparing and distributing forms, compiling data, etc;
11. assists with personnel functions such as training, supervising, and/or developing staff/student worker schedules, and assignments as needed;
12. participates in advisory committees and workshops;
13. represents the department at on and off-campus events;
14. performs assigned tasks in a high volume call center involving intake processing which may include answering high volume of phone calls and email inquiries from students and parents;
15. performs other related duties as assigned.

**Level II: Financial Aid 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 Coordinator typically:

1. verifies student eligibility criteria and reviews and awards applicants for financial aid in accordance with federal, state, and institutional regulations and policies; enters, updates, and processes award notifications;
2. assists students with suggestions for locating institutional grants and scholarships;
3. responsible for the alternative loan packaging process by determining eligibility, awarding, and performing data entry – including the management of certification of alternative loans;
4. oversees all aspects of the file management system;
5. manages correspondence and provides general financial information concerning account receivables, tuition assistance, and other financial programs;
6. monitors student's eligibility to receive financial aid;
7. notifies external servicing centers (e.g., the National Student Loan Data System, as required by Federal law) of student status and activities;
8. works with students and agencies to resolve discrepancies; participates in the evaluation process for appeals;
9. participates in the development of forms, letters, and brochures needed to collect financial aid data from student applicants;
10. 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;

11. serves as liaison with other University organizations that work with the Financial Aid Office and outside agencies;
12. participates in workshops and presentations for internal and external audiences;
13. reviews and collaborates to make sure that current financial aid information is available on the university website;
14. assists with the direction, management, and administration of scholarship and grant programs;
15. coordinates, schedules and provides in-service training and staff meetings as delegated;
16. 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;
17. processes and tracks all verification documentation submitted to the Office of Financial Assistance; enters all required corrections;
18. performs accounting functions related to grant and scholarship accounts which may include reconciling awards and payments/transactions within an electronic record system;
19. analyzes data from various agencies to determine if Federal Direct Student Loans and Federal Pell Grants awarded must be reduced to avoid overpayment;
20. performs duties of the lower-level in this series as required;
21. performs other related duties as assigned.

**Level III: Financial Aid 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 Manager typically:

1. supervises phases of the operation of student financial aid programs;
2. trains, supervises, and evaluates the work performance, effectiveness, productivity, and accountability of lower-level employees; conducts staff meetings; develops training materials; participates in interviewing and hiring;
3. assists in the development and implementation of intra-office procedures, rules, and policies; analyzes client's needs and recommends policy changes to administrators; participates in the development of compliance procedures; analyzes federal and state processing specifications on an ongoing basis;

4. 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);
5. provides technical expertise, researches references to resolve technical problems or questions and alerts their supervisor to unresolved technical problems;
6. coordinates financial aid processing with external agencies and assists in complying with reporting requirements;
7. supervises the preparation of statistical, operating, and planning records and/or reports;
8. develops forms, letters, and brochures needed to collect financial aid data from student applicants;
9. analyzes, visualizes, creates and applies new computer aided techniques and acts as project manager;
10. oversees the evaluation process for appeals;
11. oversees and maintains the quality and accuracy of financial aid publications, including website content;
12. performs duties of the lower-level in this series as required;
13. performs other related duties as assigned.

MINIMUM ACCEPTABLE QUALIFICATIONS REQUIRED FOR ENTRY INTO:

**Level I: Financial Aid Representative**

**0052**

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. Any one or combination totaling two (2) years (24 months) from the categories below:
  - a. College course work in any field
    - Associate Degree (60 semester hours) equals one (1) year (12 months)
    - 90-semester hours equals two (2) years (24 months)
    - Bachelor's Degree (120 semester hours) equals three (3) years (36 months)
  - b. work experience performing office, business, or customer service/relations activities.

KNOWLEDGE, SKILLS AND ABILITIES (KSAs)

1. Knowledge of clerical procedures.
2. Knowledge of the student application process.

3. Knowledge of Microsoft Office – Outlook, Word, Excel, and other computer programs.
4. Skill in mathematics and calculations.
5. Skill in customer service, and oral and written communication.
6. Skill in time management, organizing work assignments, and responding quickly and effectively to challenges.
7. Ability to interpret and apply internal and government policies, procedures and regulations.
8. Ability to work in an environment that can be fast-paced and stressful.

**Level II: Financial Aid Coordinator****0053****CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER**

1. Any one or combination totaling three (3) years (36 months) from the categories below:
  - a. College course work in any field
    - Associates Degree (60 semester hours) equals one (1) year (12 months)
    - 90-semester hours equals two (2) years (24 months)
    - Bachelor's Degree or higher (120 semester hours) equals three (3) years (36 months)
  - b. work experience coordinating office, business, or customer service/relations activities.
2. One (1) year (12 months) of higher-education, student services, or closely related experience.

**KNOWLEDGE, SKILLS AND ABILITIES (KSAs)**

1. Knowledge of all federal, state, institutional, and private financial aid regulations as they apply to packaging and disbursement of financial aid, disbursement of refunds, and Satisfactory Academic Progress (SAP).
2. Knowledge of the student application process.
3. Knowledge of Microsoft Office – Outlook, Word, Excel, and other computer programs.
4. Skill in mathematics and calculations.
5. Skill in customer service, and oral and written communication.
6. Skill in time management, organizing work assignments, and responding quickly and effectively to challenges.
7. Ability to interpret and apply internal and government policies, procedures and regulations.

8. Ability to work in an environment that can be fast-paced and stressful.

**Level II: Financial Aid Manager****0054**

## CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. Any one or combination totaling three (3) years (36 months) from the categories below:
  - a. College course work in any field
    - Associates Degree (60 semester hours) equals one (1) year (12 months)
    - 90-semester hours equals two (2) years (24 months)
    - Bachelor's Degree or higher (120 semester hours) equals four (3) years (36 months)
  - b. work experience managing office, business, or customer service/relations activities.
2. Two (2) years (24 months) of higher-education, student services, or closely related experience.
3. One (1) year (12 months) of supervisory experience in a higher education, student services, or closely related setting.

## KNOWLEDGE, SKILLS AND ABILITIES (KSAs)

1. Knowledge of all federal, state, institutional, and private financial aid regulations as they apply to packaging and disbursement of financial aid, disbursement of refunds, and Satisfactory Academic Progress (SAP).
2. Knowledge of the student application process.
3. Knowledge of Microsoft Office – Outlook, Word, Excel, and other computer programs.
4. Skill in mathematics, calculations, and general accounting.
5. Skill in customer service, and oral and written communication.
6. Skill in time management, organizing work assignments, and responding quickly and effectively to challenges.
7. Ability to supervise.
8. Ability to interpret and apply internal and government policies, procedures and regulations.
9. Ability to work in an environment that can be fast-paced and stressful.