



Job Class Specification

TITLE: Financial Aid Counselor I
FLSA: NONEXEMPT
EEO6: H30
IPEDS-SOC: 2071-01

JOB CODE: N09FAC
JOB TYPE: Systemwide
JOB FAMILY/SERIES: STU

APPROVED BY: Chancellor's Designee:
Carolyn Skolnik, Associate Vice Chancellor

EFFECTIVE DATE: 10/03/2016

JOB SUMMARY

Under direct supervision, receives and reviews input and output data for accuracy, completeness, and adherence to established state, federal and institutional policies governing financial aid. The Financial Aid Counselor will evaluate financial aid applicants and determine financial aid eligibility in accordance with state, federal and institutional policies governing financial aid. Provide comprehensive counseling to students regarding financial aid eligibility through in-person, phone and email conversations.

PRIMARY DUTIES

1. Provide financial information to prospective and current undergraduate and graduate students regarding application procedures for financial aid, methods used to determine eligibility, requirements for continued eligibility, disbursement and appeal procedures, and related financial aid matters.
2. Package financial aid awards, coordinate benefits and resources, review a wide range of appeals for exceptions, and apply knowledge of changing regulations governing Title IV aid.
3. Administer federal, state, and/or institutional financial aid programs as assigned.
4. Create computerized reports, merge and evaluate complex data from multiple sources, change award amounts, maintain statistical data and generate communications to students.
5. Participate in student recruitment and retention activities including attending open house events, information sessions, and other events as requested to offer guidance to prospective student staff.
6. Serve as a rotating member of the Satisfactory Academic Progress and Professional Judgment Committee.
7. Prepare and deliver financial aid presentations for current and prospective students.
8. Maintain current knowledge of federal and state grant and loan programs and need analysis formulas and regulations.
9. Participate in training and professional development activities as appropriate.
10. Other job-related duties as assigned.

Note: The intent of this list of primary duties is to provide a representative summary of the major duties and responsibilities of this job. Incumbents perform other related duties assigned. Specific duties and responsibilities may vary based upon departmental needs.

MINIMUM QUALIFICATIONS

EDUCATION: Bachelor's Degree

EXPERIENCE: : Minimum of one (1) year of professional experience in higher education, accounting, business or customer service.

OTHER: None

REQUIRED KNOWLEDGE/SKILLS/ABILITIES

Through knowledge of team office practices, procedures and equipment; of business english, grammar, spelling, and punctuation. General knowledge of the principles of team leadership and office management. Skill in planning and coordinating team clerical work; in performing the full range of team clerical and operational tasks; in interpreting and applying departmental policies and procedures; in operating manual and automated office equipment including personal computers and related software; in composing correspondence, compiling statistical data, and preparing reports; in performing mathematical computations; creation and maintenance of paper and computer files; in effective telephone usage; in organizing, coordinating, and executing multiple assignments under specific time constraints. Ability to work effectively in a self-directed team-based work environment; to understand and apply team quality and performance standards. Ability to interview and counsel students; to train and guide team clerical personnel; to maintain poise and courtesy under pressure; to lead analysis of clerical problems and selection of corrective action; to communicate effectively both orally and in writing; to plan and coordinate team activities with multiple areas of the organization; to establish and maintain effective work relationships both within and outside the team.

OTHER: Except for qualifications established by law, additional related experience and formal education in which one has gained the knowledge, skills, and abilities required for full performance of the work of the job class may be substituted for the education or experience requirement on a year-for-year basis with 30 college credits being equivalent to one year of experience.

CONDITIONS OF EMPLOYMENT

N/A