



Job Class Specification

TITLE: Financial Aid Accountant II
FLSA: NONEXEMPT
EEO6: H30
IPEDS-SOC: 2011-01

JOB CODE: N10FAS
JOB TYPE: Systemwide
JOB FAMILY/SERIES:

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

EFFECTIVE DATE: 10/03/2016

JOB SUMMARY

Under direct supervision, performs entry level professional counseling duties in one or more of the major student counseling pertaining to financial aid and exculpating student account issues to other departments such as; academic advising, career counseling, and personal counseling, as needed. Work involves a broad variety of specialized processes consistent with a clearly defined team-based work environment and continuous quality improvement objectives.

PRIMARY DUTIES

1. Performs routine counseling of students regarding eligibility for and availability of financial aid. Assists in processing student financial aid applications and awards. Verifies academic progress and assists in preparation of reports.
2. Provides financial information regarding payment responsibilities to students and options for payment on accounts. Interprets rules and regulations on loan programs. Investigates and/or processes deferments, cancellations, and defaults.
3. Responsible for assisting in evaluating processes and recommending modifications to ensure the highest level of student/customer service, workflow, and accuracy of records; providing continuous, timely, and courteous service when assisting all internal and external customers; keeping updated on articulation/alliance agreements/transfer credit policies; working with articulation and equivalency processes related to computerized degree audit system.
4. Discusses account information with responsible parties to effect collection of amounts due to the institution; makes decisions regarding requests for deviations from the expected payment terms.
5. Analyzes accounts to determine accuracy; initiates adjustments to penalty charges when warranted; contacts appropriate department, agency or institution to verify validity of questionable transactions
6. Provides information about student eligibility for disabled services and refers students as necessary.
7. Informs management of support issues, backlogs of errors.
8. Answers general questions about the university, admissions, registration, etc.
9. Processes academic information on student progress with regularly updated

evaluations.

10. Evaluate origination, disbursement and final reconciliation errors and discrepancies within the Direct Loan Program, Pell Grant Program, and Alternative Loan Program and resolve them accurately. Review complex errors and assist Federal Programs Analysts with feasible solutions.

11. Perform other 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: Four (4) years of professional experience in higher education, banking, accounting, business or customer with a minimum of one and a half (1.5) of those years in a higher education financial aid setting environment

OTHER: None

REQUIRED KNOWLEDGE/SKILLS/ABILITIES

Thorough 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