Job Classification Specification

Student Finance Counselor 1

Position Summary

First level student finance counselor responsible for administering financial aid or related programs and activities.

Develops competence by performing structured work assignments. Identifies a problem and all relevant issues in straightforward situations, assesses each using standard procedures, and makes sound decisions. Receives instruction, guidance and direction from others.

TYPICAL TASKS (These examples do not include all possible tasks in this work and do not limit the assignment of related tasks in any position of this class.)

Review and investigates financial aid requests and related records to determine if eligibility and requirements have been satisfied.

Recalculates and adjusts financial aid packages and keeps students informed of any changes.

Serves as information resources and counsels with internal and external clients on a variety of issues on areas such as aid eligibility, loan options, debt management, repayment options, customer accounts and payments, online student cost of attendance in relation to credit load and costs, and in-depth program-specific issues.

Counsel students on sources of financial aid, eligibility, loan options, debt management, repayment options, accounts and payments, online student cost of attendance in relation to credit load and costs, and in-depth program-specific issues.

Manages student finance records and investigates to resolve discrepancy.

Runs and reviews regular reports or on an as-needed basis to prevent delayed funds transmissions.

Conducts workshops and trainings to groups or individuals on student finance regulations and procedures.
Operational Role

Puts into effect what is required by defined job duties and clear objectives following established procedures and protocols; can alter the order in which work is performed but usually not the expected end result which can be improved, but not qualitatively changed.

Scope of Measurable Impact

Actions tend to facilitate work outcomes that meet general reporting requirements, internal checks and balances, regulatory guidelines, or similar results that promote the welfare of students, faculty and staff and safeguard the institution by providing necessary inputs to others in the form of information or finished materials.

Independence and Decision-Making

General supervision; progress/outcomes are frequently observed/reviewed; work is largely scripted by established procedures and guidelines.

Complexity and Problem Solving

Problems tend to be of limited scope and complexity, generally quickly and relatively easily resolved.

Required Qualifications

BA/BS or a combination of related education and work experience to equal four years; applies knowledge and skill to a recurring task or activity with emphasis typically on precision and timeliness of execution.

Effective TBD