Position Summary

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

Requires knowledge and experience in own discipline; still acquiring higher level knowledge and skills. Builds knowledge of the organization, processes and customers. Solves a range of straightforward problems. Analyzes possible solutions using standard procedures. Receives some guidance and direction.

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.)

Evaluates and analyzes financial information submitted by applicants to determine eligibility for financial assistance and to determine type and amount of aid to be awarded in accordance with established federal and university standards and guidelines.

Consults with students and parents concerning available financial aid programs to include interpreting and explaining state and federal regulations and related processes.

Researches and responds to students, parents, and University staff to resolve financial aid related issues and adjust financial aid awards.

Reviews and analyzes financial aid budget and packaging limitations prior to actual packaging to identify inaccurate information or potential issues.

Respond to inquiries, provide expertise, and trouble-shooting support to University employees and representatives from local, state, and federal agencies regarding student financial aid programs.

Evaluates appeals to determine whether exception can be granted on a case-by-case basis.

Performs year-end reporting to any university, state, federal, and outside agencies as needed.

Recommends policy and procedural changes. May lead the effort to develop and implement business processes that meet compliance requirements.
Develops and conducts workshops and trainings to groups or individuals on student finance regulations and procedures.

Acts as liaison between students and University officials and between the University and outside funding agencies or groups.

**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**

Job holders are guided by general procedures and professional norms, with periodic checks on accuracy, quality and timeliness of outcomes.

**Complexity and Problem Solving**

Finds solutions to routine technical or operational problems; once problem is identified, solutions generally can be resolved using conventional or standard procedures.

**Required Qualifications**

BA/BS with at least 2 years of experience or a combination of related education and work experience to equal six years; position involves comparing, verifying and reconciling data to help department achieve overall objectives.

Effective TBD