



DATE ISSUED: 09/05
FLSA: Non-Exempt
PTO: COVS

JOB DESCRIPTION

TITLE

Senior Financial Aid Assistant

JOB SUMMARY

Performs financial aid counseling by phone or in person regarding types of aid, processes, eligibility, and related matters. This position acts as a front-line financial aid information resource providing personal attention to the needs of students and other clients which requires a broad knowledge of financial aid. Work is performed under limited supervision and performance is based upon completion of assignments and results obtained. The performance evaluation is conducted through the performance evaluation system and in accordance with the University Policies & Procedures.

ORGANIZATIONAL RELATIONSHIPS

Reports to: Financial Aid Administrator

Supervises: May supervise clerical staff and Student Assistants

PRIMARY DUTIES - *May include, but not limited to the following:*

Counsels students by phone and in person regarding financial aid application and forms correction processes.

Explains types of financial aid and eligibility requirements.

Assists students in properly completing forms.

Accesses student financial aid information and the forms tracking system using a computer terminal.

Calculates and communicates estimates of financial aid awards.

Estimates length of time needed for processing applications, awards, and keeps students updated as to the progress.

Informs recipients of award amounts and explains award payment process.

Types or processes letters of response to students and mails requested financial aid information.

Refers and schedules students to meet with Financial Aid Counselors and Administrators.

Performs data entry and quality assurance on incoming forms.

Assists with document imaging.
Conducts financial aid information presentations.
Processes checks and other payments.
Performs verification on selected applicants.
Verifies preliminary awards and promissory note amounts.
Prepares reports.
Processes electronic fund transfers and returns (cancel) funds.
Monitors supply of application and forms to insure adequate supplies.
Makes preliminary awards.
Informs administrators of information and fund delivery problems as reported by students or other sources.
Performs and tracks entrance and exit counseling.
Identifies, prepares and submits accounts to collection agency.
Appropriately routes, responds to electronic and hard copy mail.
Places financial holds on computer.
Attends financial and professional development seminars as identified by financial aid administrator.

ADDITIONAL DUTIES

Performs other duties as requested.

EDUCATION

High school diploma or equivalent required. Bachelor's degree preferred.

EXPERIENCE

Three years of clerical and/or customer service experience required. One year of financial aid experience preferred.

KNOWLEDGE, SKILLS, AND ABILITIES - The following are essential:

Clerical aptitude and general knowledge of office practices and procedures.
Knowledge of needs analysis and financial aid processing preferred.
Skill in task organization and the ability to handle multiple and simultaneous tasks.
Skill in dealing with the students and other clients in a friendly, courteous, and professional manner.
Ability to communicate effectively, both orally and in writing.
Ability to travel to centers for information presentations.
Ability to use a personal computer and other office equipment.

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is occasionally required to stand; clean; sit; sort; hold; squat; stoop; stand; twist the body; walk; and write walk; use hands to finger; handle, or feel objects, tools or controls; reach with hands and arms; talk or hear. The employee must have the ability to occasionally lift and/or move up to 25 pounds. Specific vision abilities required by the job include ability to distinguish the nature of objects by using the eye.

WORK ENVIRONMENT

Employees are responsible for performing their duties in an environment that is free from discrimination, intimidation, coercion or harassment, including sexual harassment. Work is performed primarily indoors. The noise level in the work environment is usually low to moderate.

SAFETY

Assists in the creation of a culture of safety and environmental protection by performing work safely in accordance with departmental safety procedures. Operates equipment safely and reports any unsafe work conditions or practice to supervisor.

The job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.

Employee Signature: _____ **Date:** _____

Texas Woman's University strives to provide an educational environment that affirms the rights and dignity of each individual, fosters diversity, and encourages a respect for the differences among persons. Discrimination or harassment of any kind is considered inappropriate.

Texas Woman's University is committed to equal opportunity in employment and education and does not discriminate on the basis of race, color, religion, sex, sexual orientation, or ethnic origin, age, veteran's status, or against qualified disabled persons.

*Financial Aid Counselor II
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All positions at Texas Woman's University are deemed security sensitive requiring background checks.