



## **JOB DESCRIPTION**

**POSITION TITLE:** Financial Aid Advisor

**SUPERVISOR:** Director of Financial Aid

**CLASSIFICATION:** Full-time Staff

### **JOB DESCRIPTION**

The Financial Aid Advisor provides financial aid information and advising to prospective, current, and graduate students. In conjunction with the campus financial aid office, departments, and organizations external to UC and UGST, determines and adjusts students' financial aid packages that include grants, scholarships, and loans. The position reports and receives guidance/assignments from the Director of Financial Aid.

### **DUTIES AND RESPONSIBILITIES**

- Ensure all required Title IV compliance processes are completed accurately and in accordance with timeframes and standards established for the Urshan system.
- Counsel and advise students and parents regarding programs and procedures and assist with the applications.
- Provides statistical data to other offices on campus in support of their initiatives.
- Submission and preparation of the annual Federal Fiscal Operations Report and Application for Funds and the renewal and/or update of the Federal Application to Participate in Federal Student Aid programs.
- Determines need eligibility and funding available for student awards.
- Meets with students and parents to offer financial aid information and advice as necessary.
- Provides advice and information to current and prospective students and parents on financial aid policies, procedures, and regulations.
- Provides financial aid advising in person and by email or phone to prospective, current, and graduated students, and be able to provide individual counseling on non-routine, sensitive aid issues.
- Analyze financial data, family circumstances, and educational goals and apply knowledge of federal, state, outside agency laws, regulations and policies to determine students' eligibility for various types of aid.
- Analyze reports to resolve eligibility problems.
- Certify Private loan eligibility
- Recommends adjustments to aid awards or policy/procedures.
- Identify available resources and unmet needs to determine appropriate allocation of aid awards for individual students.
- Exercise professional judgment to authorize changes in financial aid awards that include grants, scholarships, fellowships and loans.
- Analyze exception reports of students whose aid packages could not be handled by automated programming and determine action needed to resolve issues to provide student aid allocations.
- May consult with other UC departments or external agencies on procedural issues or individual student's eligibility.

- Meets with prospective students and parents to support the enrollment efforts of the college.
- Work with departmental leadership to create an efficient and effective financial aid delivery system that ensures accuracy, accountability, and consistency of services for all students seeking financial aid.
- Maintain accurate, audit-able, and complete student financial aid records.
- Package awarded financial aid, notify students and agencies of disbursements and process necessary reports in a timely, efficient, and professional manner.
- Accurately translate ISIRs, ECARs, ERs, EFCs and R2T4s to ensure correct document submission is processed accurately.
- Provide recommendations to improve student, faculty and staff understanding and satisfaction with all processes and procedures within the financial aid department to the Executive Vice President and Chief Financial Officer.
- Process information that includes detail that is confidential in nature.
- Respond to internal requests for data and reports and review and make corrections as necessary based on reports provided.
- Utilize email and/or other electronic communication methods for internal and external customers. Other duties logically associated with this position may be assigned.

## **QUALIFICATIONS**

- Bachelor's degree; supplemented with related experience, particularly in undergraduate and/or graduate federal and institutional financial aid administration.
- Needs working knowledge of computer software such as Microsoft Word, Excel, EdConnect, EdExpress, and DL Tools in relation to financial aid.
- Possess basic math skills.
- Knowledge of federal financial aid regulations, practices, and resources of the Title IV direct loan system.
- In-depth knowledge and understanding of current financial aid needs analysis methodology and.
- federal and state financial aid program guidelines.
- Ability to handle multiple tasks with short deadlines.
- Ability to communicate effectively in writing.
- Ability to communicate orally, both in person and by telephone.
- Ability to address audiences to provide federal financial aid information during orientation sessions.
- Ability to travel to centers and off campus sites for information presentations.
- Ability to travel to off campus sites to receive training.