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| **Job Title:** Financial Services Counselor | **FLSA Classification:**   * Exempt * Nonexempt |
| **Reports to:** Director/Assistant Director | **Location:** |
| **Department:** Student Financial Services | **Division:** |
| **Employment Category:**   * Full-Time ☐ Part-Time | **Paygrade: 414** |

**PRIMARY PURPOSE OF POSITION**

Responsible for the processing of financial aid applications from initial needs analysis to packaging of offers of assistance, and counseling students regarding all student loans, scholarships, grants, and employment programs. The incumbent will also work to interpret rationale behind student budgets, need analysis computations and all program regulations, and assist in the monitoring of aid eligibility and academic progress requirements. The incumbent will ensure compliance with federal, state, and university directives as they relate to US Department of Education guidelines.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

• Counsel all prospective/current students in all matters concerning financial aid, including the application process, eligibility requirements, and aid for study abroad programs, additional loan options, student employment, scholarships, and loan repayment.

• Assist students with billing questions, monthly payment plans, registration and transcript holds.

• Assist students’ project their costs and financial aid for the year and prepare spreadsheets with this information to share with students and parents.

• Identify, determine, and approve special circumstances appeals warranting professional judgment modifications as well as appeals for aid beyond the maximum timeframe.

• Coordinate with other campus departments to help students resolve issues, such as but not limited to: Admission, Residence Life, Registrar, Hilltopper IDCard office, Health and Counseling Center, Academic Counseling and Exploration, Academic Services, and Career and Professional Development, and Human Resources.

• Ensures that all Department of Athletics and University related activities operate in full compliance with university, conference and NCAA rules and regulations. Attends and participates in scheduled compliance seminars and complies with all Athletic Department’s efforts to monitor compliance with NCAA regulations.

• Other duties as assigned.

**QUALIFICATIONS**

Bachelor’s degree required. At least two years’ experience as a Financial Services Counselor or related field. Experience developing and evaluating policies and procedures. The incumbent must have the ability and experience to handle complex and sensitive issues. Experience working with college students in the areas of mentoring, advising, and counseling preferred. Bilingual preferred, English and Spanish. Must possess an unencumbered driver’s license and the ability to successfully pass a criminal background check. check.

**WORKING CONDITIONS**

**SCHEDULE**: This is an exempt position and your expected work schedule is Monday through Friday. As an exempt employee your schedule may vary based on the number of hours needed to meet the job responsibilities. The individual holding this position may need to be available early morning, evening, and weekends to meet the needs of the department.

**PHYSICAL REQUIREMENTS**

The expectations listed below are representative of the abilities that may be needed to fulfil duties of this position. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Physical strength/endurance to enable him/her to perform/participate in the following activities:

* Physically able to lift various materials up to 25 pounds on an occasional basis.
* While performing required job tasks, physically able to bend, crouch and reach continuously.
* While performing required job tasks, physically able to climb stairs, ladders or scaffolding as necessary.
* While performing required job tasks, physically able to remain seated, frequently to continuously.
* Possesses dexterity abilities required to perform typing, operate a computer and other office equipment, to perform filing, and related job responsibilities and attention to detail competence.
* Physically able to spend significant time reading both on paper and on a computer.
* Ability to travel by car and plane for University business. Ability to drive.

**SUPERVISORY RESPONSIBILITIES**

**SUPERVISION RECEIVED:** General supervision is received by the Assistant Director of Financial Aid.

**SUPERVISION EXERCISED:** Functional supervision is provided to student workers.

The incumbent is expected to have or possess:

• Ability to handle highly confidential material, understanding that all University information should only be disclosed to others who have a need to know, for legitimate business reasons. Have the ability to exercise and apply sound judgment and decision making skills as well as the ability to maintain integrity and confidentiality of data.

**EXPECTATIONS**

• Has advanced knowledge of Microsoft Office and Google Suite software programs. Ability to quickly learn new technology and is self-motivated to stay current with emerging technologies.

• Ability to edit work for spelling and grammar, present numerical data effectively and is able to read and interpret written information. Demonstrates accuracy and thoroughness and monitors own work to ensure quality.

• Adapt to change in the work environment, manage competing demands and able to deal with frequent change, delays or unexpected events.

• Ability to accept supervision, assignments, change and correction. Proven effectiveness in dealing with a wide range of professionals, staff, and administrators.

• Ability to balance priorities to accomplish assigned tasks within the required time frame and be able to shift quickly between several tasks without loss of continuity.

• Engage in meaningful and intentional professional development appropriate for areas of responsibility and actively engage in personal and campus well-being initiatives.

• Carry out all responsibilities and objectives in professional manner.

• Accept and render constructive criticism in a professional manner.

• Adhere to the policies and procedures established by St. Edwards University.

*This document describes the general purpose, duties and essential functions associated with this job and is not an exhaustive list of all duties that may be assigned or skills that may be required.*

*I have read and understand my job description and acknowledge that management reserves the right to change or reassign job duties or combine jobs at any time.*

Employee (Print Name): Date:

Employee (Signature): Date:

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|  | HR OFFICE USE ONLY: | |
| **Approved by:** | | *Signature of the person with the authority to approve the job*  *description* |
| **Printed Name of**  **Approver:** | | *Printed name of the person with the authority to approve the job*  *description.* |
| **Date**  **approved:** | | *Date upon which the job description was approved* |
| **Reviewed:** | | *Date when the job description was last reviewed* |