

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

**PRIMARY PURPOSE OF POSITION**

Responsible for providing assistance and guidance to students and families that are seeking assistance with the educational expenses. The Student Financial Services Counselor is 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. This position 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 counselor ensures 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.
* Maintain knowledge of current federal, state, and institutional financial aid regulations and ensure compliance with laws, regulations, accreditation standards, and professional guidelines regarding student enrollment and financial aid.
* Assist students with billing questions, monthly payment plans, registration, and transcript holds.
* Exercise independent professional judgment with minimal supervision to counsel students on optimal financial package based on individual circumstances.
* Help students project their costs and financial aid for the year and prepare spreadsheets with this information to share with students and parents.
* Communicate with students and parents via email, phone call, or in person.
* Document pertinent interactions with students and parents.
* Participate in the Automated Call Distribution System, which distributes incoming phone calls for Financial Aid, Student Accounts, and Veteran Affairs offices.
* Award applicants federal, state, and institutional aid in accordance with student eligibility and institutional, federal, and state policies.
* Verify financial aid applications using federal tax documents, verification forms, etc.
* Review and financial aid packages and adjust aid as necessary to maintain compliance with federal, state, and institutional policies.
* Identify, determine, and approve special circumstances appeals warranting professional judgment modifications as well as appeals for aid beyond the maximum timeframe.
* Identify and resolve conflicting information.
* Create and execute financial literacy events and provide Exit loan counseling for students.
* Represents Student Financial Services/Veterans Affairs during orientation activities and other on and off-campus functions.
* 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.
* Attend financial aid workshops, training sessions, and conferences. Some of these training may be off-site.
* Participate in on-campus events, occasionally on weekends, such as but not limited to Admission Open Houses, Financial Aid Call Nights, Freshmen Orientation, and High School FAFSA Saturdays.
* Participate on committees and undertake projects as assigned.
* 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:

* Initiation, execution, and analysis of a number of special projects that may include Federal Work-Study, Satisfactory Academic Progress, Endowment and Gifts, State aid programs, Athletics, Abroad programs, Outside Scholarships, and Return of Title IV.
* Perform a variety of administrative functions.
* Work collaboratively with administrators, faculty, and students in promoting the student academic and personal achievement within a student-centered environment.
* Other duties as assigned.

**WORKING CONDITIONS**

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 — special Conditions: Position limits vacations during summer months due to fiscal year-end activities.

**PHYSICAL REQUIREMENTS**

The expectations listed below are representative of the abilities that may be needed to fulfill duties of this position. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions**.** Physical strength/endurance to enable the individual 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 provided by the Assistant Director of Student Financial Aid.

**SUPERVISION EXERCISED:** Functional supervision is provided to non-exempt and exempt personnel.

**EXPECTATIONS**

The incumbent is expected to have or possess:

* Ability to exercise and apply sound judgment and decision-making skills as well as the ability to maintain integrity and confidentiality of information.
* Ability to 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 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.
* Ability to maintain knowledge of current federal, state, and institutional financial aid regulations and ensure compliance with laws, regulations, accreditation standards, and professional guidelines regarding student enrollment and financial aid.
* Remains competent and current through self-directed professional reading, developing professional contacts with colleagues, attending professional development courses, and attending training and/or courses as required by the supervisor.
* 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.
* Contributes to a work environment that encourages knowledge of, respect for, and development of skills to engage with those of other cultures or backgrounds in accordance with the Holy Cross Mission.
* 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:

|  |  |  |
| --- | --- | --- |
|  | 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* |