**University Information**

<table>
<thead>
<tr>
<th>Org/College:</th>
<th>Office of the Provost</th>
<th>Department:</th>
<th>Office of Student Financial Aid</th>
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</thead>
<tbody>
<tr>
<td>UI Job Code:</td>
<td>PCF1</td>
<td>Pay Level:</td>
<td>3A</td>
</tr>
<tr>
<td>Job Function:</td>
<td>Academic Support</td>
<td>Job Family:</td>
<td>Financial Aid Services</td>
</tr>
<tr>
<td>University Classification:</td>
<td>Financial Aid Counselor</td>
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**Department Information**

<table>
<thead>
<tr>
<th>Org/Dept/Sub-dept #:</th>
<th>02-4666-00000</th>
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<tbody>
<tr>
<td>Position #:</td>
<td>00191309</td>
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<tr>
<td>Working Title (if applicable):</td>
<td>Financial Aid Processing Advisor</td>
</tr>
<tr>
<td>This Position Reports to (Title/Position #):</td>
<td>Josh Patterson</td>
</tr>
<tr>
<td>Position Has Administrative Supervision?</td>
<td>No</td>
</tr>
<tr>
<td>Position Overview: Reporting to the Associate Director of Verification and Processing, this position is responsible for processing FAFSAs, completing Federal Verification, need analysis, awards, appeals, Title IV Refunds due to Withdrawal, professional judgment appeals, cost of attendance, and other financial aid eligibility processes. This position requires critical analysis, interpretation, and understanding of federal, state, and institutional financial aid regulations and policies and an ability to contribute to policy and procedure development. This position educates and advises students and parents regarding financial aid options, policies, and procedures according to Title IV regulations and institutional policies and procedures.</td>
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**Position Information**

**Key Areas of Responsibility**

**Evaluate and Analyze Application Information/Reviews Standards and Regulations; Awards Financial Aid Award/Package (Both Need-and Merit-Based) (PCF1):** Review data and make routine decisions based on established criteria. May be responsible for recommendations that may override established criteria based on expert knowledge. Communicate information regarding implementation to current staff. Communicate defined standards and regulations.

- Review applications for accuracy, required and/or appropriate sources of documentation, and resolve conflicting information. Revise financial aid awards according to special circumstance requests, appeals, and professional judgment decisions.
- Complete consortium agreements for students studying through other institutions/programs that require unique cost of attendance adjustments. Additional adjustments made based on changes in enrollment hours and costs, additional financial aid received, or at the request of the student.
- Other duties as assigned necessary for the evaluation, awarding, and processing of student aid programs.

**One-on-One Consultation and/or Outreach Services (PCF1):** Provide information to current and prospective students and their families regarding financial aid policies, procedures, application processes and financial aid options. Develop training materials related to the awarding process. Instruct, educate and interact with students, parents, general public and UI departments regarding application policies and procedures, types of financial aid, and disbursement of funds. Define framework for routine and non-routine communication.

- Educate and advise students and their parents in-person, via email, and by phone regarding financial aid policies, procedures, application processes, and federal, state, and institutional aid programs.
- Utilize effective counseling skills in sometimes highly charged emotional situations.
- Utilize problem-solving skills to assist students experiencing financial difficulties to develop plans that encourage retention and on-time graduation.
- Serve on various internal and external committees, as well as special projects as assigned by administrators.
- Other duties as assigned necessary for providing exemplar customer service to our students and their families.

**Data Collection, Analysis and Reporting (PCF1):** Gather data.

- Verify financial aid (FAFSA) applications, verification forms and parent/student Federal tax documents for compliance with U.S. Department of Education and IRS regulations and institutional guidelines.
Conduct federal need analysis, cost of attendance budget construction, package student aid, and revise awards.

Review and process approved appeals for dependency override, Cost of Attendance budget adjustments, reductions in income, and other extraordinary circumstances.

Responsible for Return of Title IV Funds calculations and aid adjustments for both official and unofficial withdrawals.

Assist in development and revision of department policies and published documents and forms that are used to provide information to and request additional verification information from students and/or parents.

Monitor and research changes in federal regulations in order to update internal manuals used in the verification of financial aid applications to ensure compliance with Title IV regulations and US Department of Education guidelines.

Monitor trends and demographic information in students who withdraw from the University.

Assist in data analysis as it relates to student financial concerns.

Budget Oversight and Management (PCF1):

Advise management on budgetary needs or discrepancies.

Service on various internal and external committees, as well as special projects as assigned by administrators.

Committee service within the Office of Student Financial Aid includes, but is not limited to, the Cost of Attendance committee that researches and determines student budgets for financial aid packages, and Professional Judgment Committee that reviews and makes determinations with regard to special circumstances presented by students and parents.

Universal Competencies

**Diversity, Equity and Inclusion**

Proficiency Level: WORKING

Ability to work with a variety of individuals and groups in a constructive and respectful manner while appreciating the unique contribution of an inclusive workforce that brings together the talents of people across multiple identities, including: race, creed, color, religion, national origins, age, sex, pregnancy, disability, veteran or military status, sexual orientation, gender identity, or associational preferences.

- Maintains productive work relationships while considering multiple perspectives.
- Demonstrates awareness of one’s own and others’ social identities (e.g., race, gender, disability status, religion, etc.) and their relevance in the workplace.
- Resolves cross-cultural conflicts effectively.
- Articulates the unit’s commitment to diversity, equity and inclusion and the reasons for its importance.
- Engages in personal and professional development on issues related to diversity, equity and inclusion.

**Collaboration/Positive Impact**

Proficiency Level: WORKING

Ability to work with a variety of individuals and groups in a constructive and civil manner and utilize existing resources and learning to achieve or exceed desired outcomes of current and future organizational goals/needs.

- Shares appropriate information/feedback openly, professionally and respectfully.
- Models open, respectful, accepting, and supportive behaviors with team members.
- Maintains productive work relationships while considering multiple perspectives and using effective conflict resolution practices.
- Aligns expectations for self and team to achieve work objectives and overcome obstacles.

**Service Excellence/Customer Focus**

Proficiency Level: WORKING

Ability to meet or exceed customer service needs and expectations and provide excellent service in a direct or indirect manner. Ability to effectively transmit and interpret information through appropriate communication with internal and external customers.

- Enhances service by seeking ways to add value to customer interactions/services.
- Demonstrates sincere concern and takes responsibility when a customer complains, even if the cause of the problem lies elsewhere.
- Listens to feedback without defensiveness and uses it to enhance communication effectiveness.
- Communicates in alternative ways to accommodate different listeners.

As part of performing the key areas of responsibility and competencies described above, staff members are expected to meet reasonable standards of work quality and quantity, as well as expectations for attendance established by their supervisor. Staff members are also expected to comply with policies governing employee responsibilities and conduct, including those contained in the [University Operations Manual](#).

**Position Technical Competencies and Proficiency Levels**

<table>
<thead>
<tr>
<th>Accuracy and Attention to Detail</th>
<th>Proficiency Level: WORKING</th>
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<td>Understanding of the necessity and value of accuracy and attention to detail; ability to process information with high levels of accuracy.</td>
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• Processes detailed information with good accuracy.
• Utilizes specific approaches and tools for checking and cross-checking outputs.
• Develops and uses checklists to ensure that information goes out error-free.
• Accurately gauges the impact and cost of errors, omissions, and oversights.
• Learns from mistakes and applies lessons learned.

### Data Gathering and Analysis
Proficiency Level: WORKING

Knowledge of data gathering and analysis tools, techniques and processes; ability to use these to gather and analyze data for a specific or variety of needs and/or projects.

- Participates in gathering and analyzing data for a project or projects.
- Utilizes the basic data collection and evaluation tools and techniques.
- Follows proper data gathering and analysis processes and policies.
- Reports problems that arise in the data collection process.
- Reviews the results to ensure the quality and accuracy of data gathering and analysis.

### Decision Making and Critical Thinking
Proficiency Level: WORKING

Understanding of the issues related to the decision-making process; ability to analyze situations fully and accurately and reach productive decisions.

- Assists in assessing risks, benefits and consideration of alternatives.
- Participates in documenting data, ideas, players, stakeholders, and processes.
- Applies an assigned technique for critical thinking in a decision-making process.
- Recognizes, clarifies, and prioritizes concerns.
- Identifies, obtains, and organizes relevant data and ideas.

### Effective Communications
Proficiency Level: WORKING

Understanding of effective communication concepts, tools and techniques; ability to effectively transmit, receive, and accurately interpret ideas, information, and needs through the application of appropriate communication behaviors.

- Makes oral presentations and writes reports needed for own work.
- Avoids technical jargon when inappropriate.
- Looks for and considers non-verbal cues from individuals and groups.
- Listens to feedback without defensiveness and uses it for own communication effectiveness.
- Delivers helpful feedback that focuses on behaviors without offending the recipient.

### Financial Analysis
Proficiency Level: WORKING

Knowledge of and ability to read, interpret and draw accurate conclusions from financial and numerical material.

- Works with a specific financial analysis tool set.
- Utilizes basic qualitative and quantitative tools and techniques with proficiency.
- Implements valid financial analysis aligned with key criteria.
- Interprets major types of financial statements issued by the organization.
- Applies principles used to evaluate the economics of investment decisions.

### Interpersonal Relationships
Proficiency Level: WORKING

Plans, mobilizes and distributes resources to fulfill business objectives and plans.

- Collaborates with departmental associates and management.
- Adapts interaction style to situations and people.
- Identifies roles and responsibilities for self and others.
- Demonstrates an understanding of alternative points of view.
- Explains impact of interactions with individuals and groups.

### Position Qualifications (for recruiting only)

#### Education or Equivalency Required

- Bachelor's degree or an equivalent combination of education and experience is required.

#### Experience Required

- Experience working in a post-secondary academic setting or in another sector dealing with detail-oriented projects, counseling, and/or education, typically six months to one year.
- The ability to think critically and provide input and sound interpretations.
- The ability to apply knowledge and decision-making skills to individual situations.

#### Competencies Required
Demonstrates a **Working proficiency level** in:

- Understanding of the necessity and value of accuracy and attention to detail; ability to process information with high levels of accuracy.
- Knowledge of data gathering and analysis tools, techniques, and processes; ability to use these to gather and analyze data for a specific or variety of needs and/or projects.
- The ability to work developmentally with students; ability to promote student learning development and success by applying advising approaches to diverse individual student situations.
- The knowledge, and application of the communication techniques and relationship building skills that develop the ability to work with a variety of individuals and groups in a constructive and collaborative manner.
- Microsoft Excel, Word, and Outlook.

**Desirable Qualifications**

- A Master’s degree in Student Development or related field is desirable.
- Basic knowledge of University policies, procedures, and regulations.

Demonstrates a **Working proficiency level** in:

- The knowledge of and the ability to develop and implement financial aid programs and policies to attract outstanding students and help them finance their course of study.
- The knowledge of needs analysis and federal verification along with a basic understanding of Federal Methodology.