



University Information

Org/College: The Office of the Provost			
Department: Office of the Student Financial Aid			
UI Job Code:	PCF1	Pay Level:	3A
Job Function:	Academic Support	Job Family:	Financial Aid Services
University Classification: Financial Aid Counselor			

Department Information

Org/Dept/Sub-dept #: 02-4666	
Position #: 00234493	
Working Title (if applicable): Financial Aid Advisor, Processing & Verification	
This Position Reports to (Title/Position #): Associate Director, Processing & Financial Aid	
Position Has Administrative Supervision? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	

Position Information

Position Overview: 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.	
Salary: Starting salary of \$42,500 to commensurate with experience	Campus Location: University Capitol Centre
Work Modality: Hybrid; 4 Days on Campus, 1 Day Remote	Percent Time: 100%, Regular P&S, Ongoing

What You Do (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	<ul style="list-style-type: none">• 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.• Make adjustments 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.
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<p><i>that may override established criteria based on expert knowledge. Communicate information regarding implementation to current staff. Communicate defined standards and regulations.</i></p>	
<p>One-on-One Consultation and/or Outreach Services (PCF1): <i>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.</i></p>	<ul style="list-style-type: none"> • 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. • Conduct Private Loan Counseling sessions and assist as needed with helping answer students and parents email questions and phone calls during peak times of the year.
<p>Data Collection, Analysis and Reporting (PCF1): <i>Gather data.</i></p>	<ul style="list-style-type: none"> • 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. • Assist in data analysis as it relates to student financial concerns.

<p>Budget Oversight and Management (PCF1): <i>Advise management on budgetary needs or discrepancies.</i></p>	<ul style="list-style-type: none"> • Serve 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.
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Universal Competencies

Universal Competencies are those that apply to all university jobs, support our mission, and are consistent with our core values. For detailed descriptions and proficiency levels, visit the Universal Competencies <https://hr.uiowa.edu/careers/competencies/universal-competencies> page.

Collaboration/Positive Impact:

Proficiency Level: Working

Welcoming and Respectful Environment:

Proficiency Level: Working

Service Excellence/Customer Focus:

Proficiency Level: Working

How You Do Your Job (learn about competencies and proficiency levels [here](#))

Accuracy and Attention to Detail:

Understanding of the necessity and value of accuracy and attention to detail; ability to process information with high levels of accuracy.

Proficiency Level: Working

- 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:

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.

Proficiency Level: Working

- 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:

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

Proficiency Level: Working

- 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.

<p>Financial Aid Programs and Policies: <i>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.</i></p>	<p>Proficiency Level: Working</p> <ul style="list-style-type: none"> • Lists types of major financial aid for undergraduate and post-graduate students. • Identifies current institutional policies related to financial aid. • Explains the application procedures for each type of financial aid program. • Describes the laws and regulations related to financial aid in federal, state, or commercial loans.
<p>Resource Management: <i>Plans, mobilizes and distributes resources to fulfill business objectives and plans.</i></p>	<p>Proficiency Level: BASIC</p> <ul style="list-style-type: none"> • Identifies the key resources at hand to fulfill own responsibilities. • Demonstrates the ability to apportion resources to different components of a task. • Applies the concept of sustainability to conserve and reuse resources where possible. • Seeks help to obtain additional resources when necessary.
<p>Effective Communications: <i>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.</i></p>	<p>Proficiency level: Working</p> <ul style="list-style-type: none"> • 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.
<p>Financial Analysis: <i>Knowledge of and ability to read, interpret and draw accurate conclusions from financial and numerical material.</i></p>	<p>Proficiency level: Working</p> <ul style="list-style-type: none"> • 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.
<p>Interpersonal Relationships: <i>Knowledge of the techniques and the ability to work with a variety of individuals and groups in a constructive and collaborative manner.</i></p>	<p>Proficiency level: Working</p> <ul style="list-style-type: none"> • 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.

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 Qualifications:

Education (or equivalency) Required	<ul style="list-style-type: none">• A bachelor's degree or an equivalent combination of education and experience is required.
Experience Required	<ul style="list-style-type: none">• 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.
Competencies Required	Demonstrates a Working proficiency level proficiency level in: <ul style="list-style-type: none">• The ability to think critically and provide input and sound interpretations.• The ability to apply knowledge and decision-making skills to individual situations.• 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	<ul style="list-style-type: none">• 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: <ul style="list-style-type: none">• 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.