

## Position Description - Classified

### Position Status:

Working Title		Position Number
Financial Aid Specialist		E99294
Classification Title		Classification #
Office Specialist II		C0104
Position Type (FT/PT / Limited Duration)	Regular / Academic Year / Seasonal / Intermittent	FLSA Status
FT	Regular	Non-Exempt
Work Location		Department / Division
Monmouth- Polk		Financial Aid Office
Reports to		Reports to Position Number
Assistant Director		E99825
Incumbent		University ID #
TBD		

### Program Information:

<p>A. Describe the general program in which this position exists. Include program purpose, size, scope and relationship to the University's mission.</p> <p>The purpose of the Financial Aid Office is to provide monetary assistance to students who can benefit from further education but would not be able to attend Western Oregon University without such aid. The Financial Aid Office serves as custodian of federal, state, institutional and private funds thereby ensuring that students receive all funds for which they are legally entitled. The Financial Aid Office provides current and complete information concerning financial aid programs, policies and application procedures while providing adequate guidance and counseling in financial planning. The Financial Aid Office works to enhance enrollment and retention of students by administering and coordinating nearly \$55 million of aid annually for 78% of WOU's students.</p>
<p>B. Describe the purpose of this position and how it functions within this program.</p> <p>The purpose of this position is to provide clerical support for the Financial Aid Office. The person in this position must interpret and disseminate federal, state, institutional and Financial Aid Office rules, regulations, policies and procedures in regard to all financial aid and scholarships that WOU administers. The information is provided to students, families, WOU staff and the general public in daily duties by phone, email, or direct contact. The person in this position prints, prepares and emails/mails student financial aid award notifications and manages a mail merge process to print and mail merit award letters. The person in this position provides phone and email support for the financial aid office. Occasionally, the person in this position may be asked to help cover the front reception desk for short periods of time. The person provides back-up support for the student office workers and submits their monthly timecard. The person in this position is responsible for updating the NCAA financial aid information in a stand-alone database used for determining the NCAA regulation compliance. The person in this position downloads the grant and scholarship lists from the Oregon Student Access Commission and determines which awards to add which ones to route to a counselor for processing. The person in this position functions as the p-card manager responsible for tracking office expenses, inputting invoices into Banner and submitting the approved/signed monthly reconciliation report to the Accounting and Business Services office.</p>

**Position Information and Qualifications:**

A. Description of Duties/Responsibilities – List the major duties assigned to the position. Note percentage of time each listed duty is performed to total 100%. Indicate “E” = Essential, “R” = Revised	
Percent of Time	Duties
20% EF	<ul style="list-style-type: none"> <li>● Prints and proofs award offers. Sends hard copy of award offer packet to new and transfer students to undergraduate and graduate level students. Sends a follow up email explaining their aid and the process to accept/decline their offered aid. Creates packets for new and transfer students. Creates new award letters for students that have previously accepted aid, but now are eligible for additional funds that need to be accepted or declined, followed by an email to the student explaining the process. Scans financial aid copy of official award letters and counselor award letters to DocStar and assists in indexing them in the system.</li> <li>● Manages the mail merge process to print and mail merit award letters to first year and transfer students.</li> </ul>
20% EF	<ul style="list-style-type: none"> <li>● Downloads both the initial and the updated Oregon Opportunity Grant and OSAC Scholarship award lists from OSAC web site, converts to Excel format, prints the report, and data entries any new, revoked or changed grant or scholarships.</li> <li>● Processes private scholarship spreadsheet received from Accounting &amp; Business Services and determines if the grants and/or scholarship awards have already been noted in the student aid package. If not, documents the update/change in file and routes to counselor for review through scanning and indexing as received in our DocStar system.</li> <li>● Processes checks received from private donors/3<sup>rd</sup> party checks received in the FA mail. Photocopies checks, enter the information in PowerFAIDS comments area, indexes them in DocStar, and notifies the Accounting and Business Services department.</li> </ul>
20% EF	<ul style="list-style-type: none"> <li>● Records all athletic sports scholarships received in spreadsheet form from the Athletic department. This is an ongoing process, the initial WOU Athletic Scholarship fund holds all the funds the student has been awarded, then before each term starts, a portion is changed to an actual named fund per term and reducing the WOU Athletic Scholarship fund. This occurs for Fall then again for Winter and Spring terms.</li> <li>● Records student financial aid award package on the NCAA database for program compliance and eligibility information. Continually updates and reconciles the NCAA database as financial aid awards are revised for individual students.</li> </ul>
30% EF	<ul style="list-style-type: none"> <li>● Responds to student questions, comments, and inquiries via email, phone and in person. Receives and processes documents and revisions via email and in person. Assists students with navigating the process and understanding financial aid processes and procedures in person and in writing.</li> </ul>

4% EF	<p>—</p> <ul style="list-style-type: none"> <li>● Interviews, hires, trains, schedules, and supervises the student workers for the Financial Aid Office.</li> <li>● Keeps the time record sheets for the student workers and submits time and wage information to the Payroll Office.</li> </ul> <p>—</p>
5%	<p>—</p> <p>P-card manager responsible for tracking office expenses, inputting invoices into Banner and submitting the approved/signed monthly reconciliation report to the Accounting and Business Services office.</p> <p>—</p>
1%	<p>—</p> <p>Various projects as assigned by the Director or Assistant Director.</p>

**Working Conditions:**

Describe special working conditions, if any, that are a regular part of this job. Include frequency of exposure to these conditions.
<p>This is an office environment where staff must use computers, typewriters, calculators, and meet the public on a daily basis. In this office staff may be required to deal with angry, confused or frustrated clientele in person or on the phone. There are normally multiple tasks being required at one time due to our heavy workload, meeting deadlines and adhering to specific governmental and institutional regulations. On a daily basis, the office staff uses the PowerFAIDS program, Microsoft Word, WOU Web Email and Calendar, and the Banner system. The person in this position also uses the Excel program to perform their duties on a weekly basis. This office deals with a heavy amount of phone traffic.</p>

**Guidelines:**

List any established guidelines used to do this job, such as state or federal laws or regulations, policies, manuals or desk procedures.
<ul style="list-style-type: none"> <li>● State, federal and institutional financial aid policies and regulations.</li> <li>● Office policies and procedures</li> <li>● Institutional policies and procedures</li> <li>● Banner System Manual</li> <li>● Desk Manual</li> <li>● Web Mail procedures</li> <li>● PowerFAIDS Manual</li> <li>● Web Calendar</li> </ul>

How are these guidelines used to perform the job?

A thorough knowledge of state, federal and institutional financial aid policies and regulations for the purpose of advising students regarding the application, award and repayment process for financial aid. Thorough knowledge of institutional and office policies for aid applications, documents, awards and other institutionally required forms. Thorough knowledge of all computer programs utilized by the office as required by duties.

**Work Contacts:**

Who contacted		How (email / phone / etc.)	Purpose	How often?
	Admissions, Business, Registrar's Offices, Students, Parents, WOU Staff, General Public, Athletics Department	Personally, Phone, Written	<ul style="list-style-type: none"> <li>• Aid eligibility, grade audit,</li> <li>• aid procedures, aid awards, information</li> </ul>	Daily
	Other Institutions	Phone, written	Miscellaneous correspondence	Occasionally

**Job Related Decision Making:**

Describe the kinds of decisions likely to be made by this position. Indicate the effect of these decisions where possible.

This position requires a thorough knowledge of financial aid processes and rules/regulations and of all the computer programs used in the office in order to make determinations in regard to student files and their processing. This person is required to have an in-depth knowledge of financial aid in order to provide correct and thorough information to the public. This person must know when to refer functions to other appropriate staff and to set priorities within the scope of the duties of the position.

**Review of work:**

Who reviews the work of this position? (List classification title and position number). How often? Purpose of the review?

The Director of Financial Aid, Assistant Director or Office Manager reviews the work performance of the employee on a continual basis as needed. There is daily communication between the employee and the Supervisor regarding the scope and importance of various office demands for the day and week.

**Additional Job-Related Information:**

Any other comments that would add to an understanding of this position

This position requires:

1. An amiable person who is able to work with the public and staff in stressful situations.
2. A thorough knowledge of financial aid regulations and the ability to explain them to the public.
3. The ability to remain organized while handling simultaneous tasks.
4. Use of specialized computer programs

**Special Requirements / Preferred Qualifications**

General computer knowledge (Windows environment) required. Working knowledge of the PowerFAIDS, Banner, WOU Web Email and Calendar and MS Excel computer programs. Must be able to sit for long periods of time, lift up to 25 pounds, reach all drawers of standard 5-drawer file cabinets, converse in person and use the telephone.

Budget Authority: If this position has authority to commit agency operating money, indicate in what area, how much (annually) and type of funds:

N/A

**Acknowledgement:**

Employee Printed Name	Employee Signature / Date
Supervisor Printed Name	Supervisor Signature / Date
Reviewer (VP / Director)	Reviewer Signature / Date
Appointing Authority (Human Resources)	Appointing Authority Signature / Date

**HR USE ONLY:**

Received by		Date	
Position Class # (Ex. C0104)	Employee Class	Job Location	Appointment Percent
CUPA -HR# / Title	NOC Code	Category Code	SOC Code
Actions Taken			

	NBAPBUD / NBAPOSN
	NBAJOBS
	PEAFACT
	Electronically Filed