

Position Description - Unclassified

Position Status:

Position Title		Position Number
Bilingual Financial Aid Counselor		E99712
Appointment (9mos. / 12 mos. / Other)	Contract Period (from / to)	FLSA
12 mos.	07/01/21 – 06/30/22	Exempt
Position Type	Regular/Short-Term	
Full-Time	Regular	
Work Location	Department/Division	
Monmouth	Financial Aid	
Reports to	Reports to Position Number	
Assistant Director		
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 Office Financial Aid is located within the Division of Student Affairs at Western Oregon University.</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 WOU without such aid. The Financial Aid Office serves as custodians 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 over \$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>This position requires an individual who is fluent in Spanish and English (both verbal and written). The Financial Aid Counselor provides verbal and written interpretation of rules, policies, procedures and laws to the public with processes related to the application and receipt of federal, state, and institutional aid, as well as private scholarships and loans.</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	
	<p>General Work Duties</p> <ol style="list-style-type: none"> 1. Financial Aid Application Processing <ol style="list-style-type: none"> a. Reviews financial aid applications and files in depth b. Packages financial aid files according to Federal, State, and institutional policies c. Coordinates outside resources with financial aid packages d. Performs revisions of financial aid packages per student requests e. Use professional judgment decisions when appropriate to deviate from normal procedures f. Documents communication regarding the student in the student’s electronic file g. Other office work functions as needed <p>Customer Service</p> <ol style="list-style-type: none"> 1. Provides financial aid information to students, parents and other clientele in an appointment setting, over the phone, or in writing. <ol style="list-style-type: none"> a. Interprets rationale behind student budget amounts, need analysis computations, packaging policies, and all program regulations. b. Counsels’ students regarding budgeting, loan management, satisfactory academic progress or other special circumstances. c. Resolves student problems or refers to another authority if necessary 2. Seeks to provide quality service to achieve customer satisfaction by working files quickly and accurately 3. Assists in providing financial aid presentations.

	<p>4. Outreach – participates in various activities held on and off-campus such as PACK Welcome, Preview Day, New Student Week, FAFSA filing and presentation nights, etc.</p> <p>Other projects as assigned such as but not limited to:</p> <ol style="list-style-type: none"> 1. Completes student need assessments for outside agencies for their awarding purposes (Tribal Scholarships, Oregon Student Access and Completion, Vocational Rehabilitation Department, private loans, etc.) 2. Adjustments for tuition rates
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B. Required Qualifications
<p><i>List any certificates, licenses, academic degrees, or experience <u>required</u> to perform the duties of this position. Indicate if a combination of education and experience is acceptable.</i></p> <p>This individual must be fluent in Spanish and English (both verbal and written). A baccalaureate degree is required.</p> <p>The financial aid counselor must possess the ability to efficiently organize, prioritize multiple tasks, meet deadlines, and work independently and as a team player within a highly computerized environment with frequent daily interruptions. The counselor must possess excellent analytical skills. Strong verbal, written and presentational skills are required. The counselor must be proficient with word processing and spreadsheet software. The counselor must demonstrate success in working with diverse populations and with those persons with diverse points of view. This individual needs the ability to advise, or problem solve and must be able to remain calm when working with individuals who may be frustrated or hostile.</p> <p>The individual must not be in default on any federal student loan.</p>
C. Preferred Qualifications



Describe preferred education, experience, skills, licenses, certificates, and other qualifications for this position.

Financial aid experience is preferred. Previous experience working with underrepresented student populations strongly recommended but not required.

D. Knowledge Areas

List the major areas of knowledge that are required to perform the duties of this position.

These are the knowledge areas for financial aid:

1. Knowledge of and skill in applying Title IV federal, state and institutional regulations and policies when processing financial aid files. Knowledge of where regulations are located and ability to research regulations
1. Knowledge of all the loan programs: i.e., maximum awards, repayment criteria, grace periods, interest rates, when and how to apply for loans, disbursements, deferments, defaults, overpayments, differences between Subsidized, Unsubsidized, Plus loans and private loans, etc. Knowledge of federal requirements for administering programs
2. Knowledge of what constitutes eligibility for grants and institutional scholarships
3. Knowledge of work-study and non-work study job opportunities
4. Knowledge of the most current changes in all federal Title IV regulations
2. Knowledge of how to perform an in-depth financial aid application review and how to use the software program in that review
1. Knowledge the Institutional Student Information Report (ISIR)
2. Knowledge of federal tax return transcripts and W-2 forms and knowledge of how to compare those to the information the student and family has provided when applying for federal aid (verification). Verification is a part of the counselor's responsibilities and failure to perform verification correctly could result in an audit finding and financial liability for the institution
3. Knowledge of how and when to electronically make corrections to a file
4. Knowledge of all the federal matches and reject codes and how to resolve a failed match or reject
5. Knowledge of the federal need analysis formulas, i.e., how the expected family contribution is calculated
6. Knowledge of the dependency criteria and what documentation is acceptable to document an independent status
3. Knowledge of what constitutes a professional judgment decision. Knowledge of when a counselor can and should make a decision based on mitigating circumstances and when to refer to the Director or to the team of analysts led by an administrator.



- 4. Knowledge of the different packaging policies developed each year and ability to package the file individually or in batch. Ability to adjust awards due to receipt of additional resources or by student’s request as it pertains to office policy and availability of funds
- 5. Knowledge of the satisfactory academic progress requirements (grade audit for financial aid recipients to retain aid eligibility)
- 6. Knowledge of different specialized software programs and how they are used in the process of administering the financial aid programs:
 - 1. PowerFAIDS – College Board Program
 - 1) Need analysis
 - 2) Administers students’ files
 - 3) Preparing reports to assist in administering programs
 - 2. NSLDS – National Student Loan Data System. This is the U.S. Dept of Education database to access student loan history, grants and enrollment history.
 - 3. Banner Program – used to access student’s admission, registration, accounts receivable, grades, institutional addresses, and holds
 - 4. Email – to keep current with institutional notifications, financial aid listserves and communication with clientele
 - 5. Internet – to access financial aid information from such web sites as U.S. Department of Education’s Information for Financial Aid Professionals (IFAP), National Association of Financial Aid Administrator’s (NASFAA) web page, Federal Work-Study earnings on WOU’s web page, Oregon Student Access Commission (OSAC) and the National Student Loan Data System (NSLDS)
 - 6. Microsoft Word Processing and Excel programs
 - 7. ELM (Educational Loan Management) program used for certifying private student loans
 - 8. 1. Knowledge and ability to counsel current, prospective, and former students and parents, and WOU staff regarding all aspects of financial aid
 - 9. Knowledge of Western Oregon University’s campus and resources and when and how to refer students

Budget Authority:

Indicate the level of the position’s responsibility for the development, control, and monitoring of budget. Indicate the size of the budget. Check all that apply.

<input type="checkbox"/>	Develops, monitors*, and controls* <i>*Monitor means to review and approve expenses; control means to authorize budget transfer at the department level</i>	\$0
<input type="checkbox"/>	Delegated authority to monitor budget	\$0



Limited approval authority for purchase	\$0
Purchase only with higher level approval	\$0

Supervisory Authority:

If this position has the authority to act or effectively recommend action affecting employees in the following areas, check all that apply.

Hire	<input checked="" type="checkbox"/>	Assign Work
Transfer	<input type="checkbox"/>	Recommend salary adjustments
Discipline	<input type="checkbox"/>	Approve requests (i.e. leave)
Dismiss	<input type="checkbox"/>	Respond to complaints/grievances
Layoff	<input type="checkbox"/>	Conduct performance assessments
Promote	<input checked="" type="checkbox"/>	Give Direction

Positions Supervised:

Type	# of Employees	Total FTE
Teaching faculty	0	0
Classified staff	0	0
Unclassified staff	0	0
Student Employees (average per term)	0	0
Other (specify)	0	0

Decision Making Authority:

Describe the breadth and scope of decision-making authority and discretion the position has to formulate, implement, evaluate, approve and/or modify department and/or university policy, procedures, and/or programs. Describe the type of review and/or approval required by a higher level.

- When assigned an on or off campus presentation, determines the appropriate content of presentation and organizes and prepares presentational aids.
- While reviewing a financial aid file, assess the student’s course of action for current or potential financial and academic circumstances. This position is not only a “steward” of federal and state funds but also is a student advocate in determining the best aid package based on federal guidelines and each individual’s circumstances.
- Utilizes professional judgment to apply existing guidelines and procedures to students with unusual circumstances and to devise solutions to problems for which the federal government has not regulated.



4. Participates as a member of a team led by an administrator to review special cases on appeal, recommend policy and procedural changes and provide input into changes in the automated financial aid delivery system
5. Determines when and how to make corrections to a student’s information in his/her file.
6. Determines when and if the verification/documentation materials meet the requirements and resolve the rejected or discrepant issues in a student’s file.

Additional Information:

List any additional information that would help describe the nature of the position.

This position works with extremely confidential and sensitive material and must at all times be cognizant of the FERPA regulations releasing any information in a student’s file.

This position may work flexible work schedule to accommodate the needs of the office and university.

Acknowledgement:

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

HR USE ONLY:

Received by		Date	
Position Class # (Ex. UF101)	Employee Class	Job Location	Appointment Percent
CUPA -HR# / Title	NOC Code	Category Code	SOC Code

Actions Taken	
	NBAPBUD / NBAPOSN
	NBAJOBS
	PEAFAC
	Electronically Filed