**Pittsburg State University**

**Job Description**

**Financial Aid Specialist (G0N153)**

**FLSA Status:** Non-Exempt
**Grade: 005 Hourly Staff**

**Job Family:** Academic & Student Services

**Career Ladder: Financial Aid 2**

**Updated: 04/24/2019**

***The Job Description is the document used to assign positions to jobs. The Position Description is the document that provide details about a position that has been assigned to the job. The Position Description includes specific duties performed by the employee on the position, including the percentage of time duties are performed. The Position Description also identifies preferred education and experience and competencies (knowledge skills and abilities) in addition to those identified in the Job Description. Details in the Position Description are used to assess the performance of the employee assigned to the position.***

**General Description of Job – Primary Function, Supervision and Instruction Received and Interactions.**

*The information in this section provides a brief overview of the job. Additional information may be added in the Position Description.*

**Primary Function:** The primary function of the Financial Aid Specialist job is to provide assistance to students regarding financial aid through recommending, interpreting regulations, and adjusting awards as determined necessary to comply with federal, state and university policy.

**Supervision and Instruction Received:** Positions assigned to the Financial Aid Specialist job typically report to the director of the department or other appropriate administrator. Instruction received is under general supervision. The supervisor provides continuing or individual assignments by indicating generally what is to be done, limitations, quality and quantity expected, deadlines and priorities. Additional, specific instructions are given for new, difficult, or unusual assignments. The employee uses initiative in carrying out a variety of recurring duties within established policy guidelines. The supervisor assures that the work is technically accurate and in compliance with instructions or established procedures.

**Interactions (purpose, with whom, frequency):** The Financial Aid Specialist interacts daily with parents and students to interpret student needs and provide individualized service. The Financial Aid Specialist regularly interaction with other university staff and external constituents to provide information about areas of responsibility.

**Examples of Essential Duties and Responsibilities**

*The following are examples of essential duties and responsibilities that may be required for a position assigned to this job. Specific duties and the percentage of time performed are found in the Position Description for the position assigned to this job.*

1. Conduct interviews with parents and students to discuss the financial aid process and eligibility.
2. Process federal aid and interface with special software and websites.
3. Use problem solving skills to resolve problems which may delay the disbursement of financial aid funds.
4. Counsel students and parents about the financial aid processes. Filing the free application for Federal Student Aid, loan processes and Satisfactory Academic Progress. Counsel students who are graduating about the repayment, deferments, forbearance and consolidation.
5. Review and evaluate requests and make appropriate adjusts as necessary by utilizing the student information system.
6. Assist in verifying the accuracy of applicant information and files in accordance with federal, state and institutional guidelines.
7. Review confidential applicant financial aid information to confirmation accuracy and reduce over-award situations. Determine when a student has exceeded total federal aggregate loan borrowing limits and PELL program limits.
8. Maintain confidentiality and abide by University, State, and Federal policy and regulations.
9. Counsel students on entrance and exit counseling for fall, spring and summer as is required by the Department of Education. Provide counseling for students who drop below part-time, withdraw from classes or graduate.
10. Perform any other related duties as required or assigned.

**Leadership, Supervisory or Management Responsibilities**

Mark an “X” next to the one statement which best describes the job, if applicable.

|  |  |
| --- | --- |
|  | Lead worker (assigns, trains, schedules, oversees, or reviews the work of others) |
|  | Supervisor (plans, staffs, evaluates and directs work of employees in a work unit) |
|  | Indirect Supervisor (delegates authority to carry out work of a unit to subordinate supervisors or managers) |

The number of employees led, supervised, or managed is included in the position description.

**Minimum Education and Experience – Required at Hire**

*The following minimum education and experience is required at time of hire. Addition education and experience may be preferred. Preferred education and experience is identified in the Position Description.*

* High school diploma or equivalent.
* Two years of experience in office or administrative positions. Education may be substituted for experience as determined by the University.

**Examples of Competencies – Knowledge, Skills and Abilities (KSA’s)**

*The competencies listed below are representative of the knowledge, skill, and/or ability that may be required. Specific competencies and frequency performed are found in the Position Description for the position assigned to this job.*

1. **Knowledge**
* **Clerical** – Knowledge of administrative and clerical procedures and systems such as word processing, managing files and records and designing forms.
* **Computers and Electronics** — Knowledge of circuit boards, processors, chips, electronic equipment, and computer hardware and software, including applications and programming.
* **Customer and Personal Service** — Knowledge of principles and processes for providing customer and personal services.
* **English Language** — Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.
* **Student Recruitment and Retention** – Knowledge of principles of student recruitment and retention.
* **Student Support Services** - Knowledge of enrollment management, financial assistance, admissions, registrar & housing operations and functions.
1. **Skills**
* **Active Learning** — Understanding the implications of new information for both current and future problem-solving and decision-making.
* **Active Listening** — Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.
* **Complex Problem Solving** — Identifying complex problems and reviewing related information to develop and evaluate options and implement solutions.
* **Coordination** – Adjusting actions in relation to others’ actions.
* **Critical Thinking** — Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
* **Judgment and Decision Making** — Considering the relative costs and benefits of potential actions to choose the most appropriate one.
* **Monitoring** – Monitoring/Assessing performance of yourself, other individuals or organizations to make improvements or take corrective action.
* **Reading Comprehension** — Understanding written sentences and paragraphs in work related documents.
* **Service Orientation** — Actively looking for ways to help people.
* **Social Perceptiveness** – Being aware of others’ reactions and understanding why they react as they do.
* **Speaking** — Talking to others to convey information effectively.
* **Time Management** — Managing one's own time and the time of others.
* **Writing** – Communicating effectively in writing as appropriate for the needs of the audience.
1. **Abilities**
* **Category Flexibility** — The ability to generate or use different sets of rules for combining or grouping things in different ways.
* **Collaboration** - Ability to work collaboratively with all stakeholders (faculty, community partners, staff, etc.) to build/sustain internal and external relationships.
* **Deductive Reasoning** The ability to apply general rules to specific problems to produce answers that make sense.
* **Diversity –** The ability to effectively work in a diverse educational setting.
* **Inductive Reasoning** – The ability to combine pieces of information to form general rules or conclusions (includes finding a relationship among seemingly unrelated events).
* **Information Ordering** — The ability to arrange things or actions in a certain order or pattern according to a specific rule or set of rules (e.g., patterns of numbers, letters, words, pictures, mathematical operations).
* **Multi-Task and Deadlines** - The ability to manage multiple tasks and meet deadlines.
* **Near Vision** — The ability to see details at close range (within a few feet of the observer).
* **Oral Comprehension** — The ability to listen to and understand information and ideas presented through spoken words and sentences.
* **Oral Expression** — The ability to communicate information and ideas in speaking so others will understand.
* **Problem Sensitivity** – The ability to tell when something is wrong or is likely to go wrong. It does not involve solving the problem, only recognizing there is a problem.
* **Relationships** – The ability to work in a collegial environment with shared governance, and to establish and cultivate relationships inside and outside the University.
* **Selective Attention** — The ability to concentrate on a task over a period of time without being distracted.
* **Speech Clarity** – The ability to speak clearly so others can understand you.
* **Speech Recognition** – The ability to identify and understand the speech of another person.
* **Written Comprehension** – The ability to read and understand information and ideas presented in writing.
* **Written Expression** – The ability to communicate information and ideas in writing so others will understand.
1. **Work Activity**
* **Analyzing Data or Information** — Identifying the underlying principles, reasons, or facts of information by breaking down information or data into separate parts.
* **Communicating with Persons Outside Organization** — Communicating with people outside the organization, representing the organization to customers, the public, government, and other external sources. This information can be exchanged in person, in writing, or by telephone or e-mail.
* **Communicating with Supervisors, Peers, or Subordinates** — Providing information to supervisors, co-workers, and subordinates by telephone, in written form, e-mail, or in person.
* **Documenting/Recording Information** – Entering, transcribing, recording, storing, or maintaining information in written or electronic/magnetic form.
* **Establishing and Maintaining Interpersonal Relationships** — Developing constructive and cooperative working relationships with others and maintaining them over time.
* **Evaluating Information to Determine Compliance with Standards** — Using relevant information and individual judgment to determine whether events or processes comply with laws, regulations, or standards.
* **Getting Information** — Observing, receiving, and otherwise obtaining information from all relevant sources.
* **Interacting With Computers** — Using computers and computer systems (including hardware and software) to program, write software, set up functions, enter data, or process information.
* **Interpreting the Meaning of Information for Others** — Translating or explaining what information means and how it can be used.
* **Making Decisions and Solving Problems** – Analyzing information and evaluating results to choose the best solution and solve problems.
* **Monitor Processes, Materials, or Surroundings** — Monitoring and reviewing information from materials, events, or the environment, to detect or assess problems.
* **Organizing, Planning, and Prioritizing Work** — Developing specific goals and plans to prioritize, organize, and accomplish your work.
* **Performing Administrative Activities** – Performing day-to-day administrative tasks such as maintaining files and processing paperwork.
* **Processing Information** — Compiling, coding, categorizing, calculating, tabulating, auditing, or verifying information or data.
* **Updatng and Using Relevant Knowledge** — Keeping up-to-date technically and applying new knowledge to your job.

**Environmental Conditions (Hazards, Risks or Discomforts)**

*The environment conditions listed below are representative of the environmental conditions that may be present for a position assigned to this job. Environmental conditions for a position are found in the Position Description for the position assigned to this job.*

* General office conditions.
* High stress level due to deadline requirements.
* May be exposed to moderate noise levels.

**Equipment or Machines Used**

*The following are examples of equipment or machines that may be regularly used to perform the duties of the position. Specific equipment and the frequency used is found in the Position Description for the position assigned to this job.*

* Office Equipment, such as printers, copiers, fax machines, and calculators.
* Communication Equipment, such as smartphones and multi-line telephones
* Computers and Peripherals, such as computers, scanners Desktop Office

**License or Certification Required by Statute or Regulation**

*List license(s) or certification(s) appropriate for the position. Indicate those that are required by statute or regulation at time of hire.*

None

**Additional Requirements**

*The following are examples of additional requirements that may be required to perform the duties of the position. Additional requirements for a position are found in the Position Description for the position assigned to this job.*

* Regular attendance is a necessary and essential function
* Must maintain confidentiality of student record content.
* Must maintain confidentiality of student record content.
* Satisfactory Pre-Hire Background Checks Required:
	+ Sex Offender Registry Check
	+ Criminal Record

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