



**TEXAS WOMAN'S**  
UNIVERSITY™

**DATE ISSUED:** 02/15  
**FLSA:** Non-Exempt  
**PTO:** COVS

## ***JOB DESCRIPTION***

### ***TITLE***

Financial Aid Counselor II

### ***JOB SUMMARY***

Performs operational duties in the Financial Aid Office including managing office in the absence of administrators. Counsels with students, prospective students, and other clients regarding the financial aid application process and estimated awards. Verifies applicant information and makes financial aid awards. Reviews and adjusts awards to prevent over awards. Serves as resource for the department. Work is performed under general supervision and performance is based upon completion of assignments and results obtained. The performance evaluation is conducted through the performance evaluation system and in accordance with the University Policies & Procedures.

### ***ORGANIZATIONAL RELATIONSHIPS***

*Reports to:* Financial Aid Administrator

*Supervises:* May supervise clerical staff and Student Assistants.

### ***ESSENTIAL DUTIES - May include, but not limited to the following:***

- Assists in maintaining compliance with federal, state, institutional and NCAA policies, procedures and regulations.
- Reviews applications and awards financial aid.
- Revises financial aid awards to prevent over awards.
- Performs verification on selected applicants.
- Checks satisfactory academic progress.
- Counsels applicants and families on financial aid information and application directions.
- Trains and supervises clerical and student assistants.
- Acts as an office resource.
- Assists with checking satisfactory academic progress.
- Reviews NSLDS student monitoring report.
- Reviews unconverted records report & ISIRs.
- Conducts financial aid information sessions.

- Conducts formal financial aid presentations, both on and off campus.
- Assists in the development of departmental policies and procedures.
- Calculates return of Title IV funds.
- Evaluates and processes dependency change requests.
- Uses professional judgment in special circumstance situations to revise student financial aid eligibility and cost of attendance.
- Assists in forms development and revision.
- Serves as office manager in absence of administrators.

### **ADDITIONAL DUTIES**

- Performs other duties as requested.

### **EDUCATION**

High school diploma or equivalent required. Bachelor's degree preferred.

### **EXPERIENCE**

Two years of general financial aid experience required.

### **REQUIREMENT**

Regular and reliable attendance at the University during regular scheduled days and work hours is an essential function of this position.

### **KNOWLEDGE, SKILLS, AND ABILITIES - The following are essential:**

- Ability to use a 10-key calculator by touch are helpful.
- In-depth knowledge and understanding of current financial aid needs analysis methodology, and federal and state financial aid program guidelines.
- Ability to establish and maintain effective work relationships with students, faculty, staff, and the public.
- Skill in dealing with students and other clients in a friendly, courteous, and professional manner.
- Ability to communicate effectively -orally, by phone, in person, and in writing.
- Ability to travel to centers and off campus sites for information presentations.
- Ability to use a personal computer and other office equipment, including related university software and email.

**PHYSICAL DEMANDS**

The physical demands described in the Essential Duties and below are representative of those that must be met by an employee to successfully perform the essential duties of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties.

The employee may be required to travel. The employee must have the ability to occasionally lift and/or move up to 40 pounds.

**WORK ENVIRONMENT**

All employees are responsible for maintaining an environment that is free from discrimination, intimidation, harassment, including sexual harassment. Work is normally performed in a typical interior work environment.

**SAFETY**

TWU promotes a safe working environment. Employees are responsible for completing assigned tasks safely and efficiently, and supervisors are responsible for creating and maintaining a safe work environment. Employees must report any unsafe work conditions or practices, as well as any near-miss incidents, to their supervisor and Risk Management. Supervisors and employees should ensure that injury/accident reports are submitted to the Office of Human Resources and Risk Management within 24 hours of the incident.

*The job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.*

**Employee Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Employee Printed Name:** \_\_\_\_\_

***Texas Woman's University strives to provide an educational environment that affirms the rights and dignity of each individual, fosters diversity, and encourages a respect for the differences among persons. Discrimination or harassment of any kind is considered inappropriate.***

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***Texas Woman's University is committed to equal opportunity in employment and education and does not discriminate on the basis of race, color, religion, gender, sex, sexual orientation, ethnic origin, age, veteran's status, or against qualified disabled persons.***

***All positions at Texas Woman's University are deemed security sensitive requiring background checks.***