JOB DESCRIPTION

TITLE

Assistant Director, Financial Aid for Systems and Reporting

JOB SUMMARY

This position is vital to the success of the Financial Aid Office. Supervisory and administrative work is performed in the area of administrative support for the timely awarding and reconciling of financial aid awards by assisting the director and associate director with the management of the financial aid production processes including mass packaging, ensuring compliance, and promoting the enrollment objectives of the University. The Assistant Director for Financial Aid Systems and Reporting further assists by leading efforts directed towards the integration of financial aid programs with the Offices of Admissions, Admissions Processing, Registrar, and Bursar. Has oversight and leadership role for the approval of new code, modification of existing institutional, federal, and state report designs to support the management of the financial aid programs and external data requests, is responsible for the evaluation, testing and implementation of yearly regulatory updates, patches, fixes, and system modifications to ensure efficiency and compliance, maintains financial aid website content, social media content and services, maintains select enrollment management operations, and provides excellent internal customer service to staff and other administrators. Serves as a member of the office’s management team which directs all office activity including, but not limited to, planning, supervision, staff training, public presentations, serving as liaison with appropriate offices and agencies, communication, developing and implementing policies and procedures, regulatory compliance, fiscal management, report preparation, and day-to-day activities of the office. Work is performed under minimal supervision and performance evaluation is based upon completion of assignments and results obtained. The performance evaluation is conducted through the performance evaluation system in accordance with University Policies & Procedures.

ORGANIZATIONAL RELATIONSHIPS

Reports to: Associate Director, Financial Aid

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

- Works closely with the Office of Technology and conducts the evaluation, testing and implementation of yearly regulatory updates, patches, fixes, and system modifications to ensure efficiency and compliance.
- Maintains core values of integrity, ethics, and service through behaviors that demonstrate a positive commitment to students and the university.
- Transmits to and receives funds and information from state, federal and local agencies such as U.S. Department of Education, NSLDS, Title IV WAN, PCFAPS, Pell payments, FISAP, and AOR.
- Directs the development of the Elucian/Datatel Financial Aid Module.
- Directs the development, implementation, testing, and submission of Texas Higher Education Coordinating Board reports such as the Financial Aid Database Report, Texas Grant End of Year Report, Top 10 Scholarship Reimbursement Report, Summer Update Report, State Progress Reports, Funds Requests, and assists with state and federal Fiscal Operations Report, Annual Nursing Operating Report, state Affordability Report, and other annual reports.
- Works with the Director and Associate Director to translate functional business requirements into design criteria.
- As part of the Financial Aid Office Leadership Team, collaborates and sets objectives and goals for the Financial Aid Office; seeking to improve current processes to effectively serve students in meeting their educational goals.
- Works collaboratively with Financial Aid and IT staff and other departments to resolve programmatic issues, implementation of Elucian/Datatel enhancements, and establish production schedules.
- Evaluates current financial aid policies and procedures and makes recommendations for policy revisions to enhance processes through the use of Elucian/Datatel Financial Aid applications and functionality.
- Troubleshoots and resolves issues in Elucian/Datatel systems related to awarding and disbursement.
- Maintains current knowledge of federal and state regulatory changes, reporting requirements, and other pertinent information related to Elucian/Datatel and other associated systems.
- Works extensively with end users to determine the context of the data the user, may be requesting and developing accurate reports that reflect exactly what the user needs. Provides a detailed explanation of data provided to each user.
- Identifies issues relevant to the review and proposal of U.S. Department of Education regulations and the impact on policies, procedures and systems.
- Works with Financial Aid and Office of Technology to implement necessary changes. Informs and reviews regulatory changes and potential impact with the Director, Associate Director, and other university management.
- Monitors current and new software module upgrades for availability of new and/or improved functionality in order to enhance business processing for users including Elucian/Datatel, Common origination and Disbursement (COD), ED Connect (U.S. Department of Education) Direct Lending Tools, National Student Loan Data System.
(NSLDS), Central Processing System (CPS), File Transfer Programs (FTP), College Portrait, Net Price Calculator, and IPEDS.

- Identifies training requirements and changes, and implements necessary updates to training materials and communications for students and staff.
- Works with the Associate Director and Information Technology on the annual “New Year Roll” and system set-up. Assists in the development of quality control over the process.
- Reviews Financial Aid business processes and compares with the Elucian/Datatel system to determine functionality gaps and works with Information Technology and Financial Aid personnel to identify appropriate changes in business practices and/or software modifications.
- Performs Direct Loan, Pell Grant, TEXAS Grant, and Top 10% Scholarship reconciliation.
- Remains current on all federal, state, and institutional regulations and policies, as they apply to financial aid.
- Monitors financial aid transmittals and make corrections, as necessary.
- Executes EFT letter print routine and validate successful completion.
- Manages electronic communications including document tracking emails, award letter notifications, and loan disbursement notifications.
- Generates reports on new loan advances to ACS, exit interview packets, and monitor and reconcile monthly ACS reports.
- Monitors and reconciles collection agency reports.
- Performs census date reconciliation of financial aid awards and make corrections as needed.
- Approves and processes Nursing Student Loan annual write-off.
- Complies with all university, state, and federal regulations.
- Manages student loan collections.
- Manages default prevention programs.
- Supports campus outreach programs by performing financial aid presentations on and off campus.
- Participates in various committees and other team meetings as assigned by the Director or Associate Director.
- Counsels and advises prospective students, students, and parents.
- Assists in the preparation and validation of student awards.
- Performs reviews for professional judgment.
- Performs ISIR verification.
- Reviews Satisfactory Academic Progress appeals.
- Responsible for establishing job standards for subordinate staff and effectively evaluating staff under charge. The performance evaluation is conducted through the performance evaluation system and in accordance with the University Policies & Procedures.
ADDITIONAL DUTIES

- Performs other duties as requested.

EDUCATION

Bachelor’s degree in Business Administration or related field. Master’s degree preferred.

EXPERIENCE

Five years of mid-level financial aid experience required, three years of financial aid management experience preferred.

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:

- In-depth knowledge and understanding of current needs analysis methodology and federal and state financial aid program guidelines.
- Ability to plan, direct, and evaluate a complex operation, using human resources power, time, funds, and other resources for the accomplishment of long-term and short-term goals of the institution.
- Ability to establish and maintain effective work relationships with students, faculty, staff, and the public.
- Ability to provide administrative guidance within area of responsibility, providing direct training and supervision as needed.
- Ability to apply budgetary and fiscal planning techniques within financial constraints.
- Ability to organize work effectively, conceptualize and prioritize objectives and exercise independent judgment based on an understanding of organizational policies and activities.
- Ability to integrate resources, policies, and information for the determination of procedures, solutions, and other outcomes.
- Ability to communicate effectively - orally, by phone, in person, and in writing.
- Ability to represent the department and University in a friendly, courteous, and professional manner.
- Working knowledge of office practices and methods.
- Ability to perform mathematical calculations and/or verify information accurately.
- 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.

**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.*

*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.