



TEXAS WOMAN'S
UNIVERSITY™

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

JOB DESCRIPTION

TITLE

Senior Financial Aid Assistant

JOB SUMMARY

Performs financial aid counseling by phone or in person regarding types of aid, processes, eligibility, and related matters. This position acts as a front-line financial aid information resource providing personal attention to the needs of students and other clients which requires a broad knowledge of financial aid. Work is performed under limited 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:*

- Counsels students by phone and in person regarding financial aid application and forms correction processes.
- Explains types of financial aid and eligibility requirements.
- Assists students in properly completing forms.
- Accesses student financial aid information and the forms tracking system to answer questions.
- Calculates and communicates estimates of financial aid awards.
- Estimates length of time needed for processing applications, awards, and keeps students updated as to the progress.
- Informs recipients of award amounts and explains award payment process.
- Refers and schedules students to meet with Financial Aid Counselors and Administrators.
- Performs data entry and quality assurance on incoming forms.
- Assists with document imaging.

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- Conducts financial aid information presentations.
- Performs verification on selected applicants.
- Verifies preliminary awards and promissory note amounts.
- Prepares reports.
- Monitors supply of application and forms to insure adequate supplies.
- Makes preliminary awards.
- Informs administrators of information and fund delivery problems as reported by students or other sources.
- Performs and tracks entrance and exit counseling.
- Identifies, prepares and submits accounts to collection agency.
- Appropriately routes, responds to electronic and hard copy mail.
- Places financial holds on student accounts
- Attends financial and professional development seminars as identified by financial aid administrator.

ADDITIONAL DUTIES

- Performs other duties as requested.

EDUCATION

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

EXPERIENCE

Three years of clerical and/or customer service experience required. One year of financial aid 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:

- Clerical aptitude and general knowledge of office practices and procedures.
- Knowledge of needs analysis and financial aid processing preferred.
- Skill in task organization and the ability to handle multiple and simultaneous tasks.
- Skill in dealing with the students and other clients in a friendly, courteous, and professional manner.
- Ability to communicate effectively, both orally and in writing.

- Ability to travel to centers 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.

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

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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.