



**TEXAS WOMAN'S**  
UNIVERSITY™

**DATE ISSUED:** 03/14  
**FLSA:** Exempt  
**PTO:** VCS

## ***JOB DESCRIPTION***

### ***TITLE***

Assistant Director, Financial Aid for Counseling and Processing

### ***JOB SUMMARY***

This position is vital to the success of the Financial Aid Office. Supervisory and administrative work is performed in the areas of counseling, customer service, information dissemination, and managing eligibility determination and award processing, and the management of all federal, state, and private financial aid programs. 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 and in accordance with the University Policies & Procedures..

### ***ORGANIZATIONAL RELATIONSHIPS***

*Reports to:* Associate Director, Financial Aid

*Supervises:* Financial Aid Counselors, Financial Aid Advisors, Financial Aid Assistants, and Student Assistants.

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

- Assists with the management and oversight of the office of the office, assuming responsibilities of directing the office when the director and associate director are out of the office.
- Maintains core values of integrity, ethics, and service through behaviors that demonstrate a positive commitment to students and the university.
- Manages financial aid customer service functions through in-person, telephone, written, and online contacts, and public presentations.
- Provides guidance related to Title IV and veterans or military benefits.

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- Reconciles student data from multiple sources and identifies and resolves mismatches and errors.
- Analyzes and resolves issues from packaging exception reports.
- Keeps current on all financial aid regulations and policies by subscribing to list-servs, reading all financial aid regulations, policies, and procedures that are distributed by federal, state, and institutional sources, networking with other financial aid officers, and attending workshops, conferences, and seminars.
- 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.
- Manages the advising and counseling of students, parents, and prospective students regarding federal, state, and institutional financial aid.
- Manages Consortium Agreements.
- Reassess aid packages based on SAP appeals, professional judgment, and C-code resolution.
- Evaluates and recommends processes and activities to provide excellent customer service in person, by phone, and online.
- Assists in providing excellent customer service by resolving various student problem situations as they arise.
- Assists in overseeing of the accurate allocation of all funding to the appropriate award accounts, with appropriate institutional matches, if applicable.
- Assists with the accurate and efficient use and implementation of the Elucian/Datatel financial aid module.
- Ensures that all federal, state, and private aid guidelines are being followed in the awarding and disbursing of aid.
- Assists in overseeing the timely and accurate completion of all financial aid reports and surveys.
- Assists in ensuring compliance with NCAA regulations.
- Performs the review and timely updating and distribution of internal staff forms and external student/parent forms.
- Oversees student workers in the office regarding hiring, scheduling, evaluations, and recording of time worked.
- Assists with the development, implementation, and annual updates to the policies and procedures for verification, packaging, awarding, and the refunding of aid.
- Audits student files and processes on a regular basis to ensure compliance.
- Assists with aid year set-up and compliance testing.
- Performs resolution of ISIR C flag codes and conflicting information.
- Manages ISIR verification and correction processing
- Manages eligibility determination, awarding, and disbursement authorization.
- Performs Title IV return of funds, including post-withdrawal disbursements.
- 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.

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- 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 evaluates 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.

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- 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.*

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**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.***