

**FINANCIAL AID SPECIALIST**  
**Job Description**

**CATEGORY:** CLERICAL  
**POSITION STATUS:** FULL-TIME  
**FLSA STATUS:** NON-EXEMPT  
**SALARY CODE:** 32  
**REPORT TO:** DIRECTOR OF FINANCIAL AID  
**REVIEWED DATE:** FEBRUARY 21, 2019

The incumbent in this job is expected to assist the College in achieving its vision and mission of student success and service to the community. A commitment to excellence, service, and a willingness to assist as needed are expectations for all employees.

**JOB SUMMARY**

Responsible for supporting prospective and continuing students by reviewing and evaluating financial aid eligibility; providing efficient and timely delivery of accurate information, services and funding to all students; and ensuring the quality control, application tracking and verification of student files.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

- Provides information to students regarding financial aid programs, application procedures, award packaging, and financial aid academic progress.
- Reviews applications and other documents for student financial aid eligibility per the Department of Education eligibility requirements.
- Collects, analyzes, evaluates, and verifies financial aid data and documents submitted by students.
- Performs need analysis, calculations and corrections through Department of Education website.
- Submits initial, renewal and correction applications through the Department of Education website.
- Certifies student enrollment, ensuring adherence to academic progress policies and eligibility requirements; initiates appropriate adjustments to individual student financial aid.
- Participates in preparing for and facilitating financial aid workshops and presentations.
- Assists students, prospective students and others regarding eligibility requirements of financial aid.
- Prepares and reconciles a variety of reports, business correspondence, records, and/or other related documents.
- Assists with the admissions and registration process at peak times and/or when needed.
- Assists with preparation and production of new student convocation and College commencement exercises.
- Maintains awareness of best practices, emerging trends and new legislation relating to Financial Aid functional area.
- Participates in the process for systematic review and evaluation of Financial Aid functional area per the model adopted by the College, including the development and monitoring of outcomes and plans of action for improvement based on the assessment of those outcomes and plans.
- Participates in the process for systematic review and evaluation per the institutional effectiveness model adopted by the College.

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- Attends the workplace regularly, reports to work punctually and follows a work schedule to keep up with the demands of the worksite.
- Working hours may include evenings, holidays or weekends depending on deadline requirements and special events.
- Completes duties and responsibilities in compliance with college standards, policies and guidelines.
- Uses interpersonal skills and makes sound judgments to decide how duties and responsibilities are completed between coworkers, the supervisory chain, faculty, staff, students, and customers.
- Completes all required training and professional development sessions sponsored by Texas Southmost College.
- Supports the values and institutional goals as defined in the College's Strategic Plan.
- Promotes positive morale and teamwork within the department and provides exceptional customer service to students, faculty and community.
- Serves on committees as appropriate and as appointed by supervisor.
- Performs other duties as assigned.

#### **REQUIRED KNOWLEDGE AND SKILLS**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

- A strong commitment to the mission of Texas Southmost College.
- Demonstrated excellent communication, interpersonal and leadership skills; ability to work independently with little direction.
- Demonstrated knowledge of financial aid eligibility requirements and programs.
- Demonstrated organizational skills in handling, directing, and prioritizing multiple and complex assignments/projects and maintaining records.
- Ability to establish and maintain positive and effective working relationships with students, College employees and the public.
- Ability to communicate effectively, both orally and in writing; define problems, collect data, establish facts, and draw valid conclusions; and effectively present information to top management, public groups, and other groups, as required.
- Ability to respond to common inquiries or complaints from customers, regulatory agencies, or members of the business community.
- Intermediate to advanced experience in the use of a variety of computer applications and reporting tools including, but not limited to, Microsoft Access and Excel.
- Experience in working effectively in a team environment with a customer service focus.
- Excellent customer service skills and interpersonal skills.
- Excellent oral and written communication skills.
- Ability to handle sensitive and extensive confidential data.
- Problem solving skills and the ability to lead, instruct, handle a large variety of details and to work with all levels of organization.
- Ability to perform and excel in a high-tech all-digital environment.
- Proficient in the use of e-mail, word processing, spreadsheet, database, and presentation

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software and use of the Internet to access data, maintain records, generate reports, and communicate with others.

- Ability to perform and excel in a high-tech all-digital environment.

### **REQUIRED EDUCATION AND EXPERIENCE**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the education and experience required.

- Bachelor's degree from an accredited college or university with a minimum of two (2) years of direct experience working in the financial aid functional area in a college or university setting or an Associate's degree from an accredited college or university with a minimum of five (5) years of direct experience working in the financial aid functional area in a college or university setting.

### **PREFERRED EDUCATION AND EXPERIENCE**

- Prior experience with the Ellucian (formally Datatel) Colleague student information system.
- Bilingual in English-Spanish.

### **CERTIFICATES AND LICENSURES**

- Valid Texas driver's license or the ability to obtain one within 90 days of hire.

### **PHYSICAL DEMANDS**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is regularly required to talk or hear. The employee is frequently required to stand; walk; sit; use hands and fingers to handle objects, tools, or controls; reach with hands and arms; climb or balance; stoop, kneel, crouch, or crawl; and taste or smell. The employee must occasionally lift and/or move up to 15 pounds. Specific vision abilities required by this job include close vision, distance vision, and the ability to adjust focus.

### **WORK ENVIRONMENT**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee occasionally exposed to outside weather conditions. The noise level in the work environment is usually moderate.

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**Disclaimer:**

The duties listed are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the position. 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.

Are you able to perform these essential job functions with or without reasonable accommodation?

- Yes
- With Accommodations

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

Direct Supervisor: \_\_\_\_\_ Date: \_\_\_\_\_

HR Representative: \_\_\_\_\_ Date: \_\_\_\_\_

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**Posting Specific Questions**

Required fields are indicated with an asterisk (\*).

1. \*How did you hear about this employment opportunity?
  - TSC Website
  - HigherEdJobs
  - Indeed
  - LinkedIn
  - Specialty Job Board
  - Facebook
  - Work-In-Texas/ Texas Workforce Commission
  - Job Fair
  - Personal Referral
2. \*Do you have a Bachelor's degree from an accredited college or university with a minimum of two (2) years of direct experience working in the financial aid functional area in a college or university setting or an Associate's degree from an accredited college or university with a minimum of five (5) years of direct experience working in the financial aid functional area in a college or university setting?
  - Yes
  - No
3. Do you have experience with the Ellucian (formally Datatel) Colleague student information system?
  - Yes
  - No
4. Are you bilingual in English-Spanish?
  - Yes
  - No
5. \*Do you have a valid Texas driver's license or the ability to obtain one within 90 days of hire?
  - Yes
  - No