

**THE MASSACHUSETTS BOARD OF HIGHER EDUCATION
MASSACHUSETTS COMMUNITY COLLEGE
CLASSIFICATION SPECIFICATION**

**Senior Financial Aid Counselor
Job Code H05X02
Grade 5**

**CLASSIFICATION TITLE: SR. FINANCIAL AID COUNSELOR
CLASSIFICATION NUMBER: H0X02**

GENERAL DESCRIPTION OF DUTIES

Under general direction, the purpose of the classification is to assist with the planning, organization, and administration of federal, state, and institutional financial aid programs for college students, including grants, scholarships, loans, and student employment. Employees in this classification perform administrative work involving the processing of student aid applications to determine eligibility for financial aid, dissemination of financial aid information, and maintenance of financial aid records. Classification is responsible for advising students on application procedures, reviewing student aid application files, determining eligibility for federal, state, and institutional financial aid, awarding aid to eligible students, and assisting with financial aid office operations. This classification should guide students through the whole financial aid process and how it correlates and intersects a student's academic goals. This classification is also responsible for advising students on financial literacy, inclusive of personal financial management, budgeting and investing. Also responsible for coordination of assigned staff. Performs related work as directed.

SPECIFIC DUTIES AND RESPONSIBILITIES

EXAMPLES OF ESSENTIAL FUNCTIONS

The list of essential functions, as outlined herein, is intended to be representative of the tasks performed within this classification. It is not necessarily descriptive of any one position in the class. The omission of an essential function does not preclude management from assigning duties not listed herein if such functions are a logical assignment to the position.

Serves as financial aid counselor and works with students to develop plans on how best to fund their academic plans (i.e. – conducts financial aid advising, with a focus on career goals, and transfer advising, advises students regarding their fiscal responsibilities and how their academic performance affects their eligibility for aid. Provides information regarding funding options, and how to complete applications for aid assistance [federal, state, institutional and outside scholarships]; monitors academic progress of students to ensure they maintain their financial aid eligibility status; advises students on how registering, adding, or withdrawing from courses may affect their eligibility for additional aid; works with faculty to help identify students experiencing academic difficulties; participates in new student orientations, open houses, registration events and financial aid assistance workshops)

Processes student financial aid applications (i.e. – interviews/counsels students applying for aid; assists students in completing appropriate forms; assesses/verifies financial aid application files for eligibility for federal, state, and institutional financial aid and for compliance with federal/state financial aid regulations; determines types/amounts of aid to offer based on formulas and individual situations; awards aid packages to eligible students).

Coordinates the federal and state financial aid programs including all aspects of Direct Loan processing and certification, oversees the loan reconciliation process with the office of student accounts, Responsible for calculation, disbursement and reconciliation of the federal Pell grant program including monitoring all expenditures, preparing summary reports on program maintenance and expenditures, coordinate the electronic transmission of all loan and grant data through the Department of Education Common origination and disbursement system. Implement the federal College Work Study Program by determining eligibility for CWS for academic year and summer work study programs; coordinate job placement on campus; supervise the processing of time sheets and evaluations, monitors expenditures of CWS funds for the work-study and community service programs. Supervises all state financial aid programs including certification, disbursement and reconciliation.

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Assists with implementation of department computer systems (i.e. – coordinates electronic processing and correction of financial aid forms; creates/updates mnemonics used in the computerized financial aid document tracking process; assists with execution of the automated award packaging system; troubleshoots minor computer program problems).

Performs administrative tasks associated with department activities (i.e. – organizes and maintains financial aid information and confidential files; completes-mails forms for outside agencies; prepares missing information letters, rosters, reports, forms, brochures, flyers, mnemonics guides, instructional materials and general correspondence; reviews or refers to student aid reports, applications, degree audits, tax returns, benefit statements, medical reports, financial aid transcripts, rosters, payment reports, bulletins, regulations, catalogs, policies, procedures, and reference materials; operates a computer and utilizes word processing, spreadsheet, database, or other software programs).

Interacts with various agencies/individuals (i.e. – attends meetings and serves on committees; disseminates financial aid information to students, parents, and the college community; counsels/advises students and parents relating to financial aid application procedures, available resources, eligibility guidelines, regulations, loans, and special circumstances; conducts entrance and exit loan counseling sessions; conducts on-campus and off-campus workshops on financial aid; acts as liaison between Financial Aid Office, Cooperative Education Office, and Department of Transitional Assistance; communicates with other departments, students, parents, faculty members, schools, bank/loan representatives, libraries, consultants, community organizations, the public, outside agencies, and other individuals to coordinate activities, review status of work, exchange information, or resolve problems; acts as liaison with outside agencies to resolve student issues involving coordination of benefits and financial aid).

Coordinates assigned staff (i.e. – assists with recruitment, hiring, and training of new staff; instructs assigned staff in performance of duties according to established standards; prioritizes, assigns, reviews, and coordinates work; assists with complex or problem situations and provides direction; responds to employee issues and concerns; assists with interviewing and selecting new employees or work study participants).

Maintains professional knowledge in applicable areas (i.e. – maintains a working knowledge of assigned area; maintains current knowledge of applicable state, federal, and local laws/regulations; researches new trends and advances in the profession; reads professional literature; attends meetings, workshops, and training sessions).

MINIMUM TRAINING AND EXPERIENCE

Master's degree in Education, Business Administration, Accounting, Human Services, or closely related field; with two (2) years experience and/or training involving financial aid operations, or loan processing; or an equivalent combination of education, training, and experience.

SPECIAL REQUIREMENTS

This classification has no special requirements.

PERFORMANCE APTITUDES

Data Utilization: Requires the ability to evaluate, audit, deduce, and/or assess data using established criteria. Includes exercising discretion in determining actual or probable consequences and in referencing such evaluation to identify and select alternatives.

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Human Interaction: Requires the ability to inform and guide others by applying principles of counseling in addressing specific situations.

Equipment, Machinery, Tools, and Materials Utilization: Requires the ability to operate, maneuver and/or control the actions of equipment, machinery, tools, and/or materials used in performing essential functions.

Verbal Aptitude: Requires the ability to utilize a wide variety of reference, descriptive, advisory and/or design data and information.

Mathematical Aptitude: Requires the ability to perform addition, subtraction, multiplication and division; ability to calculate decimals and percentages; may include ability to perform mathematical operations involving algebraic principles and formulas, and basic geometric principles and calculations.

Functional Reasoning: Requires the ability to apply principles of influence systems, such as motivation, incentive, and leadership, and to exercise independent judgment to apply facts and principles for developing approaches and techniques to resolve problems.

Situational Reasoning: Requires the ability to exercise judgment, decisiveness and creativity in situations involving evaluation of information against measurable or verifiable criteria.

ADA COMPLIANCE

Physical Ability: Tasks require the ability to exert light physical effort in sedentary to light work, but which may involve some lifting, carrying, pushing and/or pulling of objects and materials of light weight.

Sensory Requirements: Some tasks require the ability to perceive and discriminate visual cues or signals. Some tasks require the ability to communicate orally.

Environmental Factors: Essential functions are regularly performed without exposure to adverse environmental conditions.

The Massachusetts Board of Higher Education – Massachusetts Community College is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, The Massachusetts Board of Higher Education – Massachusetts Community College will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.