

Financial Aid - Career Ladder



	Financial Aid Assistant	Financial Aid Specialist	Financial Aid Counselor	Financial Aid Outreach Counselor
Grade:	21	25	27	27
Job Class Level	Fully proficient clerical support	Full performance administrative technical work	Full performance level administrative work	Full performance level administrative work
Education (Minimum)	H.S. diploma or GED	Associate degree	Bachelor's degree	Bachelor's degree
Yrs. of Experience (Minimum)	1 year in a financial aid office	3 years in a financial aid office	5 years in a financial aid office	5 years in a financial aid office
Certifications (Required)	N/A	N/A	N/A	N/A
Training (Required)	N/A	N/A	N/A	N/A
Knowledge (Required)	<ul style="list-style-type: none"> • Basic knowledge of Student Financial Aid Office policies and procedures, federal financial aid regulations and policies, and state grant and loan programs and regulations. • Basic knowledge of customer service techniques. 	<ul style="list-style-type: none"> • Working knowledge of current Student Financial Aid Office policies and procedures, state and federal financial aid regulations and policies and institutional policies governing financial aid. • Working knowledge of one or more of the following programs: loans, work study or other federal or state program. • Working knowledge of customer service techniques. 	<ul style="list-style-type: none"> • Comprehensive knowledge current Student Financial Aid Office policies and procedures, state and federal financial aid regulations and policies governing financial aid. • Comprehensive knowledge of more or more of the following programs: loans, work study, scholarships or other federal or state programs. • Working knowledge of customer service techniques. 	<ul style="list-style-type: none"> • Comprehensive knowledge current Student Financial Aid Office policies and procedures, state and federal financial aid regulations and policies governing financial aid. • Comprehensive knowledge of more or more of the following programs: loans, work study, scholarships or other federal or state programs. • Working knowledge of customer service techniques. • Bilingual skills may be required.
Role Summary	<ul style="list-style-type: none"> • First point of contact via in-person, phone or email. • Assist in processing student financial aid applications and awards. 	<ul style="list-style-type: none"> • Advise current and prospective students/families about various aspects of the financial aid program via in-person, phone or email. • Evaluate applications and award financial aid. 	<ul style="list-style-type: none"> • Counsel current and prospective students/families on federal, state and institutional financial aid programs via in-person, phone or email. • Evaluate applications and award financial aid. • Provide leadership for a specific financial aid process and/or program(s). 	<ul style="list-style-type: none"> • Counsel current and prospective students/families on federal, state and institutional financial aid programs via in-person, phone or email. • Evaluate applications and award financial aid. • Provide leadership for a specific financial aid process and/or program(s). • Coordinate outreach activities.
Level of Autonomy	Under direct supervision	Under moderate supervision	Under general supervision	Under general supervision

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Core Functions	<ul style="list-style-type: none"> • Provide general information regarding eligibility, policies and procedures. • Assist students in preparing applications. • Receive and check documents for accuracy and completeness. • Enter applicant data into system and maintain records. • Assist students with understanding academic progress for continued eligibility. 	<ul style="list-style-type: none"> • Advise students regarding financial aid program including eligibility, regulations, program requirements, policies, procedures and related financial matters. • Assist students in completing the application process. • Evaluate financial aid applications and determine financial aid eligibility. • Award financial aid using established guidelines; exceptions are escalated. • Maintain statistical data. 	<ul style="list-style-type: none"> • Counsel and advise students/families regarding financial aid program including eligibility, regulations, program requirements, policies, procedures and related financial matters. • Interpret rules and regulations. • Evaluate financial aid applications and determine financial aid eligibility. • Award financial aid by applying independent judgment and discretion. • Review appeals for exceptions and make determinations in accordance with state, federal and institutional policies. • Maintain statistical data. • May manage a file review caseload and/or coordinate, administer or lead a specific federal, state, institutional or operational program or task. • May facilitate and/or participate in program specific or financial aid outreach activities. 	<ul style="list-style-type: none"> • Write, design and conduct financial aid presentations and workshops. • Serve as main point of contact for schools, outside agencies and MC departments to coordinate outreach events. • Counsel and advise students/families regarding financial aid program including eligibility, regulations, program requirements, policies, procedures and related financial matters. • Interpret rules and regulations. • Evaluate financial aid applications and determine financial aid eligibility. • Award financial aid by applying independent judgment and discretion. • Review appeals for exceptions and make determinations in accordance with state, federal and institutional policies. • Maintain statistical data • May manage a file review caseload and/or coordinate, administer or lead a specific federal, state, institutional or operational program or task. • May be responsible for specific college-wide program.
Core Skills	<ul style="list-style-type: none"> • Service excellence • Interpersonal skills • Communicate effectively • Problem solving • Technology literacy • Accuracy and thoroughness • Professionalism • Strives to learn 	<ul style="list-style-type: none"> • Service excellence • Interpersonal skills • Communicate effectively • Analytical thinking • Problem solving • Decision making • Technology literacy • Accuracy and thoroughness • Professionalism • Strives to learn 	<ul style="list-style-type: none"> • Service excellence • Interpersonal skills • Communicate effectively • Analytical thinking • Problem solving • Decision making • Technology literacy • Accuracy and thoroughness • Professionalism • Strives to learn 	<ul style="list-style-type: none"> • Service excellence • Interpersonal skills • Communicate effectively • Writing proficiency • Analytical thinking • Problem solving • Decision making • Technology literacy • Accuracy and thoroughness • Professionalism • Strives to learn