**Financial Aid Advisor II Standard Job Description**

**Classification Title:** Financial Aid Advisor II

**FLSA Exemption Status:** Exempt

**Pay Grade:** 9

**Job Summary:**

The Financial Aid Advisor II, under direction, counsels and provides scholarship and student financial aid information to students. Uses professional judgment to solve financial aid problems and refer students to university resources.

**Essential Duties and Tasks:**

**30%: Advising**

* Uses discretion and independent judgment to advise and counsel students on financial aid, which may include Study Abroad, Vocational Rehabilitation, Graduate, and International Students.
* Collaborates with on campus representatives regarding students financial aid concerns.
* May act as back up for the walk-in advisor.
* Awards, revises and/or approves the awarding of financial aid through the specific controls of program policy and guidelines.
* Assists in the student financial aid appeal process and shadows team members.

**20%: Financial Aid Knowledge & Team Support**

* Interprets and maintains knowledge of current federal, state, and institutional policies, procedures, and regulations pertaining to financial aid.
* In collaboration with a Marketing and Communication representative, assists in developing and revising financial aid consumer information material, publications and brochures.
* Provides assistance and guidance to other financial aid staff to ensure that processing activities adhere to established policies and procedures.
* Reviews complex rules, regulations procedures and policies relating to financial aid.
* Provides recommendations on internal procedures for customer service.
* Ensures and recommends revisions to established policies and procedures.
* Assists in mentoring and training lower-level advisors.

**20%: Student Information Review**

* Assists in the reviews of Satisfactory Academic Progress appeals and provides recommendations regarding the validity of these appeals.
* Performs reviews of student files and adjusts as needed and resolves discrepancies.
* Evaluates and analyzes a wide variety of financial aid related records.
* Determines student eligibility for exemption from registration with Selective Service based on federal guidelines with immigration documents, visas, and other documents.
* Determines if student meets requirement for federal financial aid eligibility based on federal regulation regarding citizenship status.
* May review tax returns and W2s/1099s.

**10%: General**

* Participates in and assists in the planning and execution of events for departmental initiatives (e.g. financial aid awareness programs, Aggieland Saturday, outreach efforts). Stays abreast of changes in tax and financial aid information to ensure compliance. Attends local, state, and national workshops, and conferences. Assists in conducting seminar and gives presentations. Assists in developing training material. May participate in committees for industry organizations or within the University.

**20% Duty Title (for the department's use)**

* Remaining Percentage Can Be Determined by Department to Meet Business Needs or Can Be Incorporated into Percentages Above.

**Required Education and Experience:**

* Bachelor’s degree or an equivalent combination of education and experience.
* One year in financial aid, scholarships, student employment, student veterans services or related experience.

**Required Knowledge, Skills, and Abilities:**

* Ability to meet deadlines and maintain a high level of accuracy, professionalism, and customer service.
* Working knowledge of Microsoft Office software.
* Ability to work individually or as a team in a dynamic organization.
* Good interpersonal communication skills.
* Must be literate in the English language and able to comprehend, give and follow both written and verbal instructions.
* Ability to organize and make decisions.
* Ability to work well under pressure.
* Ability to use tact, diplomacy, and judgment in dealing with all customers.
* Attention to detail.
* Ability to multitask and work cooperatively with others.

**Required Licenses and Certifications:**

* None

**Other Requirements:**

* Occasional Travel.
* Must be able to work weekends, holidays, and outside regular business hours.
* Must comply with Texas A&M System Policy 07.02 Texas Higher Education Fair Lending Practices.
* Must be in good standing on all Federal Student Loans. The U.S. Dept. of Education will not grant access to student loan data for any individual who is in default status. Access to such information is a necessity for this position. Must be able to rectify default status within three months of employment. Good standing must be maintained for continued employment.

**Physical Requirements:**

* None

**Machines and Equipment Used:**

* Computer
* Telephone

**Is this role ORP Eligible? If so, it needs to meet the criteria on the** [**Rules and Regulations of the Texas Higher Education Coordinating Board**](https://reportcenter.highered.texas.gov/reports/data/user-friendly-version-of-ch-25/)**.**

**Yes**

**No**

**Does this classification have the ability to work from an alternative work location?**

**Yes**

**No**