**Financial Aid Advisor IV Standard Job Description**

**Classification Title:** Financial Aid Advisor IV

**FLSA Exemption Status:** Exempt

**Pay Grade:** 11

**Job Summary:**

The Financial Aid Advisor IV 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. Coordinate and/or serve as a resource for one or more specialized programs or functions for financial aid. Supervises day-to-day activities of a functional unit, including student workers, graduate assistants, support staff and/or financial aid advisors.

**Essential Duties and Responsibilities:**

**30%: Financial Aid Knowledge & Team Support**

* Coordinates key departmental functions in support of leadership.
* 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, develops and revises financial aid consumer information material, publications and brochures.
* Attends and leading departmental and other training.
* Provides direct support and guidance to other financial aid staff to ensure that processing activities adhere to established policies and procedures.
* Provides advanced counseling and guidance to 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.
* 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.
* Mentors and trains lower-level advisors.
* Works with state, regional or national committees concerning regulations and impacts to financial aid offices and students.
* Assists team members as necessary with complex situations.

**20%: Financial Aid & Scholarships**

* Evaluates and analyzes a wide variety of financial aid related records.
* Performs reviews of student files and makes adjustments 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.
* Reviews tax returns and W2s/1099s.

**10%: Student Information Review**

* Awards, revises and/or approves the awarding of financial aid through the specific controls of program policy and guidelines.
* Makes adjustments, if necessary for compliance issues, and submits the correction.
* Reviews student financial aid appeal process and makes determinations. Reviews Satisfactory Academic Progress appeals and provides recommendations regarding the validity of these appeals.
* Coordinates and administers daily internal verification process.
* Prepares student files to be verified by internal staff.
* Performs quality reviews of completed files for accuracy.
* Researches, writes and maintains internal verification procedures and policies.
* Trains and mentors' other staff on the process of verification.
* Guides the staff with the use of internal procedures and policies.
* Provides suggestions to management regarding regulatory changes and internal best practices.
* Reviews data uploaded from FAFSA against data received and resolves discrepancies or adjusts data in Banner/Compass as appropriate.
* Works with teams / advisors to resolve discrepancies or other problems.
* Responds to varied questions related to verification.

**10%: Supervision**

* Supervises day-to-day activities of a functional unit, including student workers, graduate assistants, support staff and/or financial aid advisors.
* Hires, trains, evaluates, and terminates staff.
* Participates in operational and strategic planning for team and department.
* Compiles data and generates reports on team and/or functional area.
* Provides data and/or reports as needed to administration.
* Responds to varied questions or data requests.
* May coordinate coverage for the team.

**5%: General**

* May host and present at various workshops.
* 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.
* Conduct seminars and gives presentations.
* May give presentations on specialized programs.
* Develops training material.
* May participate in committees for industry organizations or within the University.

**5%: Specialized Program**

* Coordinates and/or serves as a resource for one or more specialized programs or functions for financial aid.
* Coordinates the planning and execution of events related to the program.

**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.
* Four years in financial aid, scholarships, student employment, student veterans services or related experience. Some supervisory or program coordination/oversight 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.
* Supervisory or leadership skills.

**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**