

# Classification Description

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**Job Title:** Financial Aid Operations Officer

**Pay Grade:** 105

**Job Code:** 4015

**FLSA Status:** Non-Exempt

## **Job Purpose**

The Financial Aid Operations Officer provides routine administrative support with the ability to perform more complex duties to relieve the supervisor of administrative and operational details. The employee will have solid knowledge of general office procedures and possess appropriate administrative and computer skills critical to the position. This position is also responsible for the front desk operations, including professionally greeting and directing incoming students, parents and other visitors to the Office of Student Financial Aid. This position maintains specialized records and performs duties which require knowledge of the operations of the Office of Student Financial Aid. This position sets the tone for a student-centered, high performance culture that emphasizes excellence in service, quality, productivity, and standards.

## **General Responsibilities**

### **Essential Functions**

All staff in the Office of Student Financial Aid are expected to serve students in a manner that prepares students for success. Financial aid staff will engage in outreach via email communication, call campaigns, and other proactive measures to ensure students are well-informed of their financial aid options and opportunities.

Provides customer-focused service in a professional and productive manner. Handles sensitive student information with confidentiality and discretion.

Acts as central receiving for the Office of Student Financial Aid for telephone calls, email requests, walk-in traffic and other College staff.

Closely monitors walk-in and phone traffic to assist supervisory staff in determining when and where additional help may be needed.

Greets incoming students and parents and enters their information into the visitor tracking system to be seen by the appropriate advisor.

Provides and verifies information received for the office and efficiently and professionally communicates with students, parents, and others to the Office of Student Financial Aid.

Enters, retrieves, edits, stores and verifies financial aid data entered on personal computer or network system.

## FINANCIAL AID OPERATIONS OFFICER

Schedules appointments and meetings with financial aid advisors and administrators; directs callers and visitors to appropriate financial aid or other department personnel; takes and relays accurate messages.

Provides general financial aid information to students, staff, and the public under the supervisor's direction. Refers technical matters to the proper person or department.

Maintains a general knowledge of financial aid processes, policies and regulations and is able to explain those policies and processes to students and others, as needed.

Guides students through the process of locating and applying for financial aid.

Maintains accurate records of incoming and outgoing financial aid correspondence.

Performs general office duties and assists in other aspects of clerical processing in the department such as filing student information, copying student records, etc.

Oversees that documents received via the fax machine are distributed to appropriate staff in a timely manner and that the fax/copy machine is maintained in working order.

May oversee phone operations in a call-center environment depending on the number of dedicated phone staff assigned to answer calls on a given day.

Operates a variety of office equipment in performing routine administrative support tasks, (i.e., fax machine, copier, calculator, computer, phone system). Uses appropriate office technology to create, transfer, transcribe or compose departmental documents (i.e., contracts, meeting minutes, correspondence, and memoranda) in prescribed formats (i.e., fax, e-mail, campus mail, etc.).

Creates, processes, balances and reconciles departmental budget and related financial records with guidance from the supervisor. Areas of responsibility may include, but are not limited to, purchase orders and requisitions, travel reimbursements, payroll, contracts, etc.

Maintains department or supervisor calendar, arranging and/or monitoring scheduling for meetings, travel, and department functions. Receives and reviews invoices, reports, forms, and applications, and distributes copies to appropriate personnel. Maintains department inventory, and orders restock of supplies and materials, as needed.

Assists in the training of work-study students who work at the front desk and in managing their work performance.

Performs other duties as assigned.

These essential job functions are not to be construed as a complete statement of all duties performed; employees will be required to perform other job-related duties as required. An employee with a disability is encouraged to contact the Human Resources Office to evaluate the job in greater detail in order to determine if she/he can safely perform the essential functions of this job with or without reasonable accommodation.

## FINANCIAL AID OPERATIONS OFFICER

### **Knowledge, Skills and Abilities**

#### **Minimum Qualifications**

Associate's degree from a regionally accredited institution of higher education.

Three (3) years of full-time or related professional work experience in customer service or administrative support. Appropriate combination of education and work experience may be substituted.

Knowledge of business English, spelling and arithmetic, office practices and procedures.

Demonstrated experience using a personal computer, office software such as MS Office and electronic mail. Computer use includes data entry, word processing and/or accounting functions.

Ability to operate small office equipment including copy machines and multi-line telephone systems.

Demonstrated ability to:

- Think critically and creatively, have a high standard of integrity, and be motivated to incorporate best practices into the organizational culture.
- Exhibit a thorough knowledge of policies, procedures, and outside regulations pertaining to the position.
- Possess a working knowledge of operational and fiscal analysis techniques.
- Take initiative and independently plan, organize, coordinate and perform work in various situations where numerous and diverse demands are involved.
- Anticipate, investigate, and analyze problems and address them proactively.
- Communicate effectively, both orally and in writing.
- Establish and maintain effective working relationships with faculty, staff, students and the public.
- Work in a fast-paced, demanding environment.
- Work independently and follow through on assignments.
- Exhibit solid organizational skills and be detail oriented.
- Work with a variety of constituencies and be willing to contribute to a team effort.
- Exercise discretion and good judgment at all times and in all contexts and maintain confidentiality.
- Work effectively with all constituencies of the College.
- Collect, organize, analyze and present information in a meaningful manner.
- Collaborate and be effective working with diverse populations.

### **Critical Skills/Expertise**

All employees are expected to:

- Promote a common purpose consistent with stated College goals and demonstrate a commitment to students and the learning environment.

## FINANCIAL AID OPERATIONS OFFICER

- Possess the knowledge of general written standards and procedures utilized, and have the ability to read, interpret, and follow procedural and policy manual related to the job tasks.
- Demonstrate the ability to respond to supervision, guidance and direction in a positive, receptive manner and in accordance with stated policies.
- Provide quality customer service by creating a welcoming and supportive environment.
- Present a professional image in word, action and attire.
- Demonstrate professionalism in dealing with a diverse population while understanding and respecting each other's view of the world, personalities and working styles.
- Conduct oneself in a manner consistent with the College's standards of ethical conduct.
- Apply effective techniques to create working relationships with others to achieve common goals; successfully communicates and collaborates with others to achieve goals.
- Demonstrate skills necessary to look at situations and processes critically to make recommendations for improvement.

### **Work Conditions/Physical Demands/Special Conditions**

Physical: Routinely requires the ability to see, hear, and speak. Routinely requires sitting, bending, stooping, walking. On occasion, incumbents may be required to lift 20 or more pounds.

Environmental: Normal general office.

Mental: Routinely requires the ability to interpret, analyze and perform critical thinking skills.

Approved: February 11, 2022. Revised: July 1, 2023.