



Financial Aid Intake Specialist

Financial Aid

JOB SUMMARY

Under the general supervision of the Assistant Director of Financial Aid, the **Financial Aid Intake Specialist** performs a wide variety of tasks in support of the financial aid office, including: providing direct customer service to students, staff, and/or faculty, communicating detailed financial aid or program information to internal and external customers, and reviewing and preparing files for awarding of financial aid. The position will also review and process incoming documents, determine file completion status and will perform tasks that sometimes involve interpretation of policies, procedures, and regulations in the area of financial aid.

MAJOR DUTIES

Customer Service

- Understand and independently articulate general program eligibility requirements (how “need” is determined, criteria for various grants, Stafford loans, and work-study), the application process, status and timelines.
- Provide excellent customer service by demonstrating empathy, listening attentively to questions and concerns, responding professionally to hostility, communicating clearly with native and non-native English speakers, and exercising professionalism and discretion in all communications and actions.
- Assist with answering phones, emails, and questions from walk-in students and the general public in an accurate manner, providing clear explanations of complex and technical information.
- Directly assist students in resolving eligibility issues and application difficulties in all financial aid programs.
- Counsel students and parents regarding educational funding strategies.
- Process incoming documents (tax returns, verification forms, data sheets, appeals, etc.), enter computer coding, determine missing information and file completion.
- Perform general clerical duties (filing, mailing, copying, faxing, answering phones).
- Maintain the confidentiality of student files and records per FERPA guidelines.

Intake Coordination

- Determine eligibility for federal and state funding by applying extensive knowledge of regulations governing aid programs. Analyze and evaluate files for eligibility and need based on application data, federal database matches, academic progress requirements, etc.
- Process and track incoming documents (tax transcripts, verification forms, appeals, etc), and enter appropriate coding in Banner, determine missing information and file completion status.
- Prepare files for awarding, including reviewing verification documents for accuracy and completeness, performing a Satisfactory Academic Progress review.
- Assist with retrieval of ISIR files via EdConnect software and the Secure Shell Client. Upload files into Banner, track uploads, and organize and run associated reports as needed.
- Send out missing information, tracking and award letters regulation to keep students apprised of their financial aid status.
- Process Consortium and Transient agreements as requested by other institutions.

Other Duties or Special Projects as Assigned

- Perform other duties as assigned to support the team in achieving its service objectives.

KNOWLEDGE REQUIRED BY THE POSITION

Knowledge and Technical Skills:

- Knowledge and understanding of state and federal financial aid regulations and rules
- Ability to provide superior frontline customer service skills in-person and over the phone
- Ability to communicate effectively, verbally and in writing, to our internal and external customers for the purpose of having them understand
- Must be flexible and able to negotiate priorities according to campus need while considering rules and process requirements in decision making
- Ability to prioritize unplanned but required job duties with ongoing confirmed deadlines and regulations
- Ability to work independently in a busy environment with regular interruptions
- Ability to work under stressful situations and manage stress appropriately
- Ability to consistently and accurately document information and process files
- Ability to understand a student services model and how student needs fit into this model within higher education
- Computer literate skills with competency in Microsoft Outlook and Office Suite, as well as student or customer database management systems, such as Banner

Job Developed Skills:

- Ability to fully understand aspects of financial aid or scholarship programs, including organization of paperwork, troubleshooting and problem solving
- Ability to effectively use knowledge of Darton State College degrees, programs, certificates, deadlines, student types, departments, staff, policies and procedures necessary to perform job functions and refer students appropriately
- Ability to effectively enter, retrieve and use data in Banner to assist students
- Knowledgeable of state and federal financial aid programs, rules and regulations

Traits and Characteristics:

- Knowledge of Darton's culture, mission, vision and core values
- Excellent interpersonal and problem solving skills
- Able to work effectively and collaboratively in a team environment
- Able to organize, prioritize and work effectively in a busy office environment
- Able to actively contribute to a work environment that embraces diversity and uses diverse perspectives when interacting with students, staff and/or faculty
- Acceptance of personal responsibility for the quality and timeliness of work
- Maintain confidentiality of student information and be empathetic to individual student circumstances.
- Flexibility and openness to change as part of working in a dynamic learning environment

SUPERVISORY CONTROLS

The Assistant Director of Financial Aid assigns work in terms of general instructions. The supervisor spot-checks completed work for compliance with procedures, accuracy, and the nature and propriety of the final results.

GUIDELINES

Guidelines include federal and state rules and regulations. These guidelines require analysis, judgment, selection and interpretation in application.

COMPLEXITY/SCOPE OF WORK

Employees in this position perform work using knowledge and experience specific to financial aid and exercise independent judgment in interpreting and applying rules and regulations. They also independently advise students, staff, program participants and/or the public regarding program content, policies, procedures and activities and recommend alternative courses of action for students. Employees have extensive involvement with students, staff, the public and/or agencies in carrying out program activities, and coordinate, schedule and monitor financial aid activities to determine consistency with department and college goals. Strict regulations contribute to the complexity of this position.

CONTACTS

Contacts consist of both internal and external customers, such as co-workers, other college employees, students,

parents, representatives of student aid organizations, representatives of federal or state agencies, and members of the general public.

Contacts are typically to provide services; to give or exchange information; to resolve problems; or to justify, defend or negotiate matters.

PHYSICAL DEMANDS/ WORK ENVIRONMENT

Positions in this class typically require: keyboarding, talking, hearing, seeing, and repetitive motions. Work is primarily performed at the Darton State College campus, in an office environment and requires standing and/or sitting and using computers for extended periods of time.

Sedentary Work: Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to transport, put, install, remove, or otherwise move objects, including the human body. Sedentary work involves staying in a stationary position to a significant degree. Jobs are sedentary if moving is required only occasionally and all other sedentary criteria are met.

SUPERVISORY AND MANAGEMENT RESPONSIBILITY

None.

MINIMUM QUALIFICATIONS

Minimum Qualifications:

- Associate degree from a regionally accredited college or sufficient experience to understand the basic principles relevant to the major duties of the position, usually associated with the completion of an apprenticeship/internship or having held a similar full-time position for one to two years previously
- Two years of customer service experience
- Strong computer knowledge with the ability to navigate through Microsoft Office Suite applications
- Strong written, verbal and interpersonal communication skills
- Prior experience and knowledge in a financial aid environment
- Demonstrated commitment to pluralism and the ability to support a diverse workplace and educational environment

Preferred Qualification(s):

- Experience with computerized applications (i.e., Banner) within the State of Georgia University System