

Roberts Wesleyan University Job Description

Title: Student Financial Services Counselor

Department: Office of Student Financial Services

Reports to: Assistant Director of Student Financial Services

Status: Professional Non-Exempt

Job Objective: At Roberts Wesleyan University, Student Financial Services comprises both Financial Aid and Student Accounts. The Student Financial Services Counselor is responsible for processing of financial aid and student account functions including counseling and supporting students regarding all aspects of paying for University.

Within a centralized student financial services structure, this position is responsible for supporting a variety of populations, including providing counseling to all students and parents on financial issues, financial aid packages, billing questions, and payment plan management. This position serves as the first point of contact for student inquiries in the Office of Student Financial Services.

Job Responsibilities:

Counseling (70%)

- Participate in meeting the guidance and informational needs of students and families through individual counseling, written correspondence, training sessions and orientation programs
- Completes proactive outbound call/email campaigns to move students through an aid application and financing processes
- Advise prospective and returning students and families regarding financial aid options, application processing, and other issues related to education finance including bill payment options and the status of their account
- Engage in proactive efforts to assist students in the completion of their applications, financial literacy activities, and the financing of their education including assisting students with payment arrangements
- Assist students with the completion of required financial aid forms and electronic processes such as the Free Application for Student Financial Aid (FAFSA), master promissory notes, entrance loan counseling and other related documents
- Assists in outgoing call campaigns; deadline reminders, collection outreach and other notifications as necessary
- Maintains professionalism and exceptional customer service; even during occasional emotionally charged conversations
- Responds to inquiries with accurate and timely information
- Communicates and works with other student services offices to timely and effectively resolve student inquiries
- Timely documents pertinent information or discussions with students in PowerFAIDS and PowerCAMPUS
- Serves as “on-call” counselor when necessary. This includes phone, walk-in, and appointment counseling

Program Management (25%)

- Helps to ensure the effective operation of the student financial services office by utilizing knowledge and expertise in systems management and applying it to the office operations
- Ensures effective operation of the area of responsibility within the Student Financial Services Office by developing and recommending policies, adapting the systems to maximize efficiency, working collaboratively with colleagues, and performing duties as assigned

General Responsibilities (5%)

- Responsible for providing high quality correspondence, informational materials, and program documentation
- Make recommendations on policies and procedures, content and design of forms, office operations and customer service matters
- Engage in University-wide initiatives to support student success, achieve strategic growth, and build sustainable foundations
- Special projects and additional duties as assigned to enhance the level of service and commitment to students, their families and the University

Skills and Characteristics:

- Excellent listening and counseling skills, including the ability to discern information, handle sensitive situations with confidence and formulate the best plan/resource to assist students
- Expert understanding and proficiency with computerized information and billing and financial aid systems and experience in PowerFAIDS or PowerCAMPUS preferred
- Strong communication skills, including the ability to communicate with credibility and confidence to various constituencies and across different departments, as well as government and other agencies
- Excellent customer service skills, including the ability to handle sensitive situations with confidence and display unconditional positive regard
- Strong ability to identify, analyze, and solve problems and develop cohesive and practical solutions that fit the department policies, practices, and methods
- Commitment to detail and quality work that is reliable and consistent
- Ability to organize work in a systematic way and manage time effectively
- Excellent math and calculations with speed and accuracy
- Working knowledge of federal financial aid regulations
- Proficiency in Google and Microsoft suite software
- Value teamwork and work well with others

The approved rate of pay for this position is \$17.00 - \$17.50/hr

Consequence of Error:

Error in judgement could cause financial loss, withdrawal of student(s), and poor community relations.

Confidential Data:

- Financial data
- Student records and FERPA
- General information regarding the University that may be confidential

Level of Supervision:

- Under general direction, within policy guidelines and with considerable latitude for exercise of independent judgement
- Must be able to analyze problems, propose, and implement solutions

Mental/Visual Demand and Physical Effort:

- Strong written and verbal communication skills

- Limited amount of lifting, carrying, pushing, and pulling
- Occasionally involved in emotionally charged conversations. Imperative to maintain professionalism and quality customer service.

Environment:

- Work in office environment involving contact with students, parents, alumni, faculty, staff, service providers and vendors
- Work has deadlines, multiple interruptions, high volume and may be stressful at times