Position Summary: Designated as an Office manager who provides program and administrative support to the Financial Aid Office under the supervision of the Director of Financial Aid. Duties include adhering to financial aid polices and procedures following very complex federal, state and institutional regulations governing student financial aid in performing paraprofessional work as initial contact person. Perform data intake, processing and recording as well as verbal dissemination of financial aid information. Coordinate daily processing and problem solving for PLUS and alternative loans. Supervise the work of all student employees as well as limited term employee (LTE) when utilized. Oversee a wide variety of activities that require a significant degree of independent thinking, decision-making and action under conditions of general supervision.

1. Office Manager, managing polices, procedures and office operations to accomplish Financial Aid process (65%)
   a. Supervises the office reception area with high level of knowledge to telephone, Email, and over the counter inquires about a wide range of financial matters including:
      i. Assist students with problem resolution.
      ii. Advise students’ parents as needed.
      iii. Refer students to appropriate office; arrange appointments for Director, Senior Information Manager, and Senior Student Services Coordinator.
      iv. Serve in a “triage” role, either advising the student as appropriate or referring the student to the appropriate counselor or office (75% of students’ questions are answered at the front desk). Review student financial aid tracking screens to answer general and detailed questions such as determining current status, whether appropriate application material is on file and communicate that information to the student and/or parent. Interpret and advise students using numerous screens and student data base. Extensive knowledge of student information and reporting systems is required.
      1. Determine a student’s eligibility for various aid programs, including the transferring of eligibility between programs. This involves extensive knowledge of complex regulations and institutional policy.
      2. Counsel students regarding responsibilities as student borrowers. Inform students of loan options, interest rates, deferment, default, and loan consolidation information.
   b. Manage the receipt, recording, filing and scanning of student documents.
      i. Audit financial aid documents for compliance with established polices and procedures. This includes reviewing each document for completeness and accuracy and returning forms that are not acceptable.
      ii. Take off check list in Peoplesoft and scan documents into Image Now.
      iii. Do quality assurance on scanned document, link to appropriate student.
      iv. Distribute scanned documents to ensure proper workflow is completed.
      v. Track incomplete and follow up scanned documents.
      vi. Follow federal, state, and institutional guidelines in regard to record retention for both paper and electronic documents.
      vii. Collaborate with Information Manager to improve system.
   c. Responsible for and knowledge of polices and regulation for all purchase requisitions and University Procurement card.
      i. Purchase all supplies, memberships, publications, prepare vouchers and purchase requisitions.
      ii. Research and prepare equipment and material specifications, receive bids and determine which bids are appropriate for the need of the department.
      iii. Maintain proper tracking process for department charge-backs.
      iv. Verify, audit and maintain cost center account in WISDM. Prepare documents for Business Office audits.
   d. Cross train in other office areas to enable continuity of workflow during employee absences.
   e. Responsible for incoming paper mail and distribute accordingly.
   f. Hire, train, and supervise student employees.
      i. Prepare job descriptions.
      ii. Conduct interviews and hire student employees.
      iii. Confirm employment eligibility by verifying enrollment in Peoplesoft.
      iv. Prepare work study and student assist contracts.
      v. Ensure employment documents are completed prior to start date.
vi. Responsible for training student employees.

vii. Review daily projects then coordinate student work load to meet deadlines.

viii. Verify and audit time entered into HRS for completeness and accuracy.

ix. Conduct student evaluations.

x. Develop, update and implement internal operating procedures manual for training students, limited term employees and new hires.

xi. Manage the Form Inventory.

i. Coordinate the updating of all financial aid and office forms. Estimate the number required and order forms from University Duplicating as necessary. Anticipate office needs and order envelopes accordingly.

ii. Order on-line preprinted, federal publications including FAFSA forms and brochures. Make sure an adequate supply is available.

xii. Maintain office master calendar.


i. Monitor and review all Short-Term loan submitted by advisor for completeness and accuracy.

ii. Act as liaison with Bursar’s Office for Short-Term Loan Process.

iii. Maintain records on approved loans.

iv. Receive and deposit monies, update payments.

v. Reconcile checkbook every month.

xii. Maintain inventory of department property. Coordinate repairs or replacement.

xv. Assist with the development and recommendation of polices, procedures, guidelines and instructions to improve administrative and operating effectiveness.

xvi. Responsible for coordinating work hours and schedules for LTEs.

xvii. Ensure adequate office coverage during open hours.

xviii. Back-up Student Payroll.

i. Assist supervisors and students with questions/concerns.

ii. Confirm student employment eligibility by verifying enrollment in Peoplesoft.

iii. Collect documentation: W-4, I-9, direct deposit, selective service, international student documentation and contracts.

iv. Enter new employees and update information in HRS.

v. Prepare and process biweekly payroll.

xix. Participate in the interviews, recommend for hire and train other office personnel.

xx. Attend professional conferences and relevant workshops.

xxi. Attend Bi-weekly departmental staff meetings.

xxii. Prepare notifications.

i. Send yearly reminders to students with BIA, DVR or 3rd party payers’ to complete proper paperwork.

ii. Notify students when checks are available at Cashiers office.

xxiii. Other duties as assigned.

2. Financial Aid Processing (35%)

a. Evaluate and complete need analysis for Native American Funding using State and Federal guidelines.

i. Determine a student’s eligibility.

ii. Calculate potential awards.

iii. Request monies.

iv. Adjust aid for students not attending, on suspension, with refund or special handling, including transferring of loan programs if needed.

b. Audit student record for eligibility for release of aid of outside awards, including scholarships.

i. Revise financial aid awards, if appropriate, analyzing each individual situation and determine the proper revision procedure to use.

ii. Interpret and verify the correctness of the monetary value of the revision to the student’s financial aid award.

iii. Accountable for handling paper checks, make sure they are recorded and processed properly, securely and timely.

c. Enter Foundation Scholarships and Non-resident Tuition Waivers, as appropriate.

d. Assist Director with specialized projects.

e. Audit requested information and provide accurate financial aid information to various agencies including, Department of Vocational Rehabilitation (DVR), Social Services and others.

i. Calculate potential awards.

ii. Request monies.
iii. Audit student file and determine necessary adjustments.
f. Process GRE waivers and PPST applications as needed.
g. Assist in Summer College Packaging.
   i. Screen each application for completeness and accuracy.
   ii. Prepare electronic record and prepare file for packaging.
   iii. Send correspondence to student to comply with polices and procedure or alternative funding.
h. Alternative student loans
   i. Review student/co-signer portion of loan application for completeness, complete certification section according to applicable federal guidelines, forward application to the appropriate agency.
   ii. Maintain office record of loans processed.
   iii. Prepare paper loan checks for disbursement to students.
      1. Check for “holds” placed by departments.
      2. Check for previous loan defaults
      3. Check for academic/financial aid suspension.
      4. Determine appropriate steps to be taken if any of 1-3 apply and proceed accordingly.
      5. Reconcile office records with loan proceeds and account for difference.
      6. Check enrollment status.
      7. Prepare release forms for cashier office.
   iv. Prepare necessary notification correspondence and annotate office records for any loan cancellations.
v. Review, verify accuracy and certify loans through the Scholarnet software program.
vi. Calculate, compute and input loan certification to the Scholarnet software program.
vii. Use independent judgment to resolve problems, such as exception files and following through on application that remain in certain statuses too long.
viii. Ensure compliance with Federal law.
i. Federal Direct loans
   i. Monitor the entrance interview requirements of all first time Direct Loan borrowers before funds are released.
   ii. Electronically download then audit and record compliance with entrance/exit counseling and Master Promissory Note requirements according to current Federal Regulations.
   iii. Prepare and process correspondence regarding delinquent and default status of students per notification from Loan Servicer.
   iv. Prepare and process required exit counseling information for graduating students and students that have withdrawn, place holds when appropriate.
   v. Process in-school deferment forms.
j. Process the Wm. D. Ford PLUS Loan Application.
   i. Review PLUS loan application to determine completeness, accuracy and eligibility.
   ii. Enter parent information in to Peoplesoft.
   iii. Originate and adjust loan records for eligible students.
   iv. Prepare notifications, including acceptance, denial, and disbursement.
   v. Audit loan application amount requested to ensure compliance with federal law.
   vi. Problem solve rejected applications, correct as appropriate.
   vii. Ensure compliance with Federal law.
k. Consortium agreements
   i. Audit application to determine eligibility.
   ii. Act as liaison with visiting institutions.
   iii. Coordinate the processing of agreements and required record keeping to ensure compliance and notification of enrollment status with Registrar’s office.
   iv. Monitor the student’s progress and determine the effect on future eligibility for financial aid, place holds when necessary.
l. Other duties as assigned.

Knowledge/Skills

All Excellent communication skills, both written and verbal.
All Knowledge of Financial Aid policies and procedures.
All Ability to read and interpret Financial Aid Handbook and Manuals.
All Ability to comprehend, interpret and implement Federal, State and University rules and regulations.
All Strong interpersonal skills; ability to deal effectively with difficult situations.
All Accuracy, attention to detail, and service-oriented attitude.
All Computer skills, including Peoplesoft, Scholarnet, Image Now, HRS, Excel, Word, EDConnect, COD, and Internet.
All Ability to work with all personnel, students, faculty, and staff with a high degree of professionalism.
All Ability to work under general or no supervision.