

Saint Michael's College Job Description

Job Title: Student Financial Services Counselor

Department: Student Financial Services

Supervisor or Manager: Associate Director of Student Financial Services

Date Created: 7/25/2005

Last Revised: 05/23/2022

Our Mission: It is the mission of Saint Michael's College to contribute through higher education to the enhancement of the human person and to the advancement of human culture in the light of the Catholic faith.

Major Objectives:

- Ensures that students and families receive exceptional customer service and comprehensive information about financing a Saint Michael's education
- Provides counseling to students/families who contact Student Financial Services (SFS) by phone, e-mail or in-person
- Reviews financial aid files, complete federal verification and resolve conflicting information in an accurate and timely manner
- Administer financial aid in accordance with federal and state regulations and institutional policy

Essential Duties and Responsibilities:

- Provides exceptional customer service
- Advises prospective and current undergraduate students, graduate students, and parents on all aspects of financing a Saint Michael's education
- Assists students and families in navigating the financial aid and billing process
- Responds to student and family inquiries by phone, e-mail, and in-person
- Executes financial aid packaging, award adjustments, posting of outside scholarships, etc.
- Proactively contacts students and applicants to resolve incomplete financial aid files and outstanding student account balances
- Reviews financial aid files, completes federal verification, resolves conflicting information, and packages Title IV and institutional financial aid in accordance with applicable regulations and policies. Processes outside scholarships received from third party agencies
- Assists with administration of VA education benefits
- Reviews and adjusts financial aid offers in order to resolve overawards
- Employs knowledge of Return to Title IV calculations and serve as back-up for financial aid adjustments in the case of a student withdrawal
- Serves as SFS liaison with College offices and campus constituencies
- Represents Student Financial Services at Admission Open House and other events
- Supports daily office operations centered on financial aid processing and communication with students and families
- Demonstrates a multicultural awareness and contribute an inclusive, diverse, and respectful campus community
- Promotes a flexible, collaborative, and inclusive work environment and engages in educational opportunities to increase awareness and understanding of diverse populations
- Recognizes the value of cultural, ethnic, gender, and other individual differences in people. Helps to create an environment that values and supports differences
- Helps to foster an environment that values and supports differences
- Seeks different points of view and leverages diverse perspectives in group processes and decision-making.
- Engages with students and constituents with a high level of inclusivity, equity, and sensitivity
- Supports fair treatment and equal opportunity for all. Listens to and objectively considers the ideas/input of others. Respects the talents and contributions of all individuals.

Secondary Responsibilities:

- In the absence of student service staff, provides coverage at the front desk (greeting students and families, answering questions, processing brief transactions)
- Answers questions about SMC Student Health Insurance requirement and annual waiver process
- Participates in professional judgement appeal review
- Participates in development of office policies and procedures
- Reviews and prepares departmental communications including letters, e-mails, publications, and website
- Performs special projects within Student Financial Services department on as-needed basis
- Performs other miscellaneous job-related duties as assigned

Positions Supervised:

- Student Employees

Major Contacts:

- Student Financial Services
- Prospective, current and former students and families
- Registrar's Office
- Student Life
- Admissions

Demonstrates Excellence:

- Explains complex topics to various audiences and successfully guides students and families through the financial aid and billing processes
- Demonstrates a commitment to compliance. Acts as an advocate for students and families while clearly communicating and adhering to federal regulations and institutional policies
- Ability to reflect on one's own racial identity and how it has shaped one's own life experiences and current perspectives
- Understands the impact, challenges, and barriers that racism, inequities and bias have on developing systems of advantage and disadvantage relative to access and attainment in higher education
- Thoroughly comprehends federal financial aid regulations and institutional financial aid, billing, and tuition payment policies
- Demonstrates technical aptitude in navigating various systems including Colleague® by Ellucian, COD, NSLDS, FAA Access, ELM, and systems associated with monthly payment and student health insurance vendors. Adeptly navigates existing and new systems and identifies process improvements
- Demonstrates organization and attention to detail
- Works both independently and collaboratively with strong problem solving, critical thinking, and communication skills. Maintains a positive and cooperative working relationship with members of the office and the campus community and frequently engage with colleagues to solve problems and improve operations
- Respects the confidentiality of information provided by students, families, and other constituencies. Understands FERPA, GLB and other applicable privacy and data security regulations
- Changes pace quickly and thrives in a fast-paced work environment.
- Actively participates in and contributes to the larger Saint Michael's community.

Education and Work Experience:

- Bachelor's degree or equivalent combination of education and experience
- Previous customer service experience required
- 1-3 years of financial aid/student accounts experience required

Analytic Skills:

- The ability to recognize several likely causes of events, analyze relationships among several parts of a problem or situation, and then formulate a multi-step response is required

Computer/Technology Skills:

- Familiarity with Microsoft Office products, especially Excel

Required Qualifications:

- Analytical skills
- Excellent verbal and written communication skills
- Experience with Microsoft Office products including Excel, Word, and Outlook
- Experience working with Student Information Systems

Preferred Qualifications:

- Public speaking
- Familiarity with Federal Student Aid Systems
- Familiarity with Colleague® by Ellucian

Language and Literacy Skills:

- Exhibits outstanding verbal and written communication skills

Licenses, Certifications and Other Requirements:

- None required

Physical Demands:

Work is often performed in a typical office environment requiring:

- Sitting in a normal seated position for extended periods of time
- Reaching by extending hand(s) or arm(s) in any direction
- Dexterity sufficient to manipulate objects with fingers, for example operating a computer keyboard
- Communication skills using the spoken word
- Vision sufficient to see within normal parameters
- Hearing sufficient to hear within normal range
- No or very limited physical effort
- No or very limited exposure to physical risk

While performing the duties of Student Financial Services Counselor, the employee may occasionally be required to lift up to 10 pounds.

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with a disability to perform the essential functions.

Additional Requirements for the Job:

- None required

The above job description in no way states or implies that these duties are the only duties performed by this employee. The incumbent is expected to perform other related duties necessary for the effective operation of the College.