

Warren Wilson College
Position Description

POSITION TITLE: Financial Aid Counselor

DEPARTMENT: Financial Aid

REPORTS TO: Associate Director of Financial Aid

FLSA STATUS: Non-Exempt

POSITION SUMMARY:

The Financial Aid Counselor provides reception, correspondence, counseling, loan processing, and data entry duties for the Financial Aid Office. The Counselor helps in the preparation of reports, as delegated, and the overall work flow of the office.

Specific Responsibilities:

1. Responds to information requests from telephone calls, walk-ins, fax or email. Documents all contacts and results (verbal and written).
2. Answers questions, inquiries, or requests from students/applicants/parents in person or in writing regarding financial aid.
3. Counsels and advises students and parents about financial aid process, application procedures, financial aid eligibility, the award package, costs, and loans. Individualizes information to the particular situation and needs of the student.
4. In the absence of the Associate Director of Financial Aid, utilizes EdConnenct and EdExpress Software to draw down ISIRS, and imports information into Aptron.
5. Prints and reviews ISIR. Sends requests for information to those students whose ISIRS are selected for verification, have conflicting information on the ISIR, or whose file is incomplete.
6. Reviews reprocessed ISIRS for accuracy. Assist with reprocessing.
7. Collects, sorts, and reviews correspondence (mail, email, and faxes) for accuracy and completion. Prepares file for award preparation.
8. Enters information into GUI system Financial Aid Page and Form Page with date of requested items and date of receipt of requested documents.
9. Places credits on accounts for loans once loan application process is complete.
10. Completes award packaging for international students according to institutional policy and assists with award packaging for nonneed students.
11. Originates loans (Stafford, Plus) using EdExpress, and certifies private loans using ELMNET.
12. Completes Return of Funds through ELMNET (private loans) for students who withdraw/cancel during the semester.
13. Records and monitors the receipt of student/parent loans (in excess of \$5 million) and outside scholarships (in excess of \$456,000). Requires contact with lenders and community agencies.

14. Prepares reports as delegated (i.e. NC State Approving Agency schedule/costs/catalog approval each year).
15. Renews honor scholarships annually according to the scholarship criteria.
16. Tracks Satisfactory Academic Progress of all students receiving financial aid.
17. Sends exit packages according to the regulations of the program.
18. Maintains the Financial Aid website.
19. Develops written communication (email reminders) to students on timely financial aid issues.
20. Utilizes Fire Engine Red, and GUI reports to generate emails to students such as missing documents notification (verification) and (loans). Uses Fire Engine Red to generate loan disbursement notifications.
21. Monthly reconciliation of loan data using Aprtron, EdExpress. DL Tools, and information from the Accounting Office (drawdowns).
22. Maintains inventory of closed clients files at Iron Mountain, and requests shredding as appropriate.
23. Maintains office supplies, and orders all office supplies.
24. Performs other financial aid duties, as requested.

WORKING CONDITIONS

1. Flexible and able to handle multiple tasks and continuous interruptions
2. Office environment

QUALIFICATIONS

1. Minimum of two years of college required; college degree preferred.
2. Ability to interact positively with staff, students, and parents.
3. Computer literate – proficiency in the use of Excel spreadsheets, Microsoft Word, and the Internet.
4. Good oral and written communication skills; strong customer relation skills.
5. High level of organizational skills, ability to function in multi-task oriented environment, and the ability to perform during periods of peak productivity required.
6. Prior financial aid experience helpful.

Updated 10/10/2011