

Colorado Mountain College

Position Description

Title: Financial Aid Specialist II
FLSA Classification: Non-Exempt
Hiring Salary Range: \$57,183.30 - \$63,537 (\$27.49 - \$30.55 per hour)

Primary Responsibility

Under the supervision of the Assistant Director of Financial Aid, the Financial Aid Specialist II conducts student need analysis, student outreach performs federal verifications, monitoring and awards student aid, provides confidential financial aid advising, makes professional judgment decisions regarding student aid eligibility and facilitates problem solving with students and parents. Complies with federal, state and institutional policies and regulations to determine appropriate distribution of financial aid funds. Serves as a lead for all Work Study Liaison at all college locations. Provides effective communication with students. This Financial Aid Specialist II is the first points of contact for prospective students and families and is instrumental in establishing an understanding of all financing options available to make CMC viable and affordable.

Financial Aid Specialist II performs at a fully operational level in handling complex and various tasks that require a high degree of independent judgement. Meets all required deadlines. Can perform the position and other tasks needed to assist the entire financial aid department with minimal instruction and is fully aware of and operates within all college operating policies and procedures.

Pre-requisites for Position (Qualifications Standards)

Education and experience are sufficient for the rigors of the position. Examples may include a Bachelor's Degree and four years related experience, or equivalent education and experience that will provide the necessary knowledge, skill and abilities to perform the functions of the position.

The Financial Aid Specialist II will work proactively and utilize problem-solving skills to promote success through enrollment and retention while maintaining compliance with all internal and federal financial aid policies and procedural information. Internal customer service is extensive and time sensitive.

Experience with the administration of Federal Student Aid, VA and TA funds. NASFAA U Credentialing courses preferred: Application Process, Campus-Based Programs, Cost of Attendance, Packaging & Notification of Awards, Student Eligibility, Verification, Cash Management, Direct Loans, Federal Pell Grants and Iraq and Afghanistan Service Grants, Need Analysis, Professional Judgment, and Satisfactory Academic Progress. Renew certificates as needed, to support professional development needs. Colleague software experience preferred.

Welcoming. Innovative. Focused on Student Success. These principles reflect the soul of CMC. They guide us in building our teams, cultivating leaders, and expanding our approaches and mindset. They guide us to be an institution of higher education that's the right fit for every faculty member, staff, student, and community member in its trust. Applicants must demonstrate a commitment to working effectively with students, employees, and community members of all backgrounds.

Essential Duties

- Effectively communicate/explain all necessary steps of the Free Application of Federal Student Aid (FAFSA) process, student responsibilities, and assist students and families with any questions concerning the completion of the FAFSA process.
- Possess a basic understanding of federal student aid processes such as ISIR review, federal Direct and plus loan eligibility, entrance and exit counseling requirements, verification process and awards, work study, as well as government policies, procedures, regulations, and laws.
- Awareness of R2T4 process to facilitate calculations.
- Ability to perform SAP appeals and Professional Judgment.
- Knowledge of Veterans benefits.
- Conduct workshops and presentations to students, campus faculty, staff, high schools and community members concerning financial aid either in person or virtually.
- Educate prospective families on the various ways to pay for college, including but not limited to federal financial aid programs, Colorado grants and scholarships, external scholarships, and loans.
- Deliver outstanding customer service to prospective and re-entering students and families through various remote platforms, e.g., Zoom, Microsoft Teams, phone to discuss financial aid processes and options.
- Provide extensive student-focused, solution-oriented communication and support to ensure all students are comfortable and sufficiently informed/prepared.
- Works closely with various departments, such as admissions, student accounts, registrars, and advising, to assist when and where needed.
- Promptly respond to all student questions, concerns, and needs regarding the financial aid process within an established timeframe.
- Perform data entry of students' financial aid information and all comments in our databases related to students' status to ensure full and proper documentation.
- Counsels' students with financial literacy.
- Participates in student registration activities and development activities designed to promote student awareness, retention, and success.
- Uses a database and various computer software to maintain and monitor confidential and other student records and files.
- Attend financial aid training activities as appropriate.
- Assist and advise students applying for federal, state and institutional financial aid programs; research available options and sources; discuss various eligibility criteria and explain ineligibility as necessary; interpret and explain CMC's financial aid policies and procedures.
- Analyze and verify financial data and evaluate student and parent ability to pay for education; evaluate and verify financial aid applications to determine eligibility requirements including parent and student income and assets, household size, untaxed income, investments and business assets and debts.

- Maintain financial aid student records and other records by reviewing and updating pertinent data via a remote computer terminal.
- Utilize professional judgment to adjust a student's eligibility based on documented circumstances in accordance with federal statutes; may refer complex eligibility situations to the Director.
- Monitor and evaluate satisfactory academic progress, or academic eligibility, of students. Review and approve / deny student appeals relating to academic progress.
- Participate in a full range of reporting duties; assist in compiling, analyzing, and maintaining data for the maintenance of various records and the preparation of various reports.
- Maintain current knowledge and learn new state and federal laws, rules, and regulations pertaining to financial aid; attend seminars, conferences, workshops, and other training sessions; participate in the development of new/revised procedures to accommodate changes that will positively impact efficiency and quality of services provided.
- Conduct presentations, workshops, and orientations to inform high school students, the community and various groups of financial aid program requirements and deadlines.
- Interact with federal, state, scholarship, social services and related agencies and financial institutions to facilitate the student eligibility process.
- Train and serve as an operational resource to other staff and/or students, as appropriate; may supervise student employees or lower-level staff.
- Provide support to students experiencing family, personal or economic crises which may impact school performance; work with special needs populations to identify unique needs and coordinate appropriate services.
- Assigned various financial aid department projects to manage and implement.
- Is trained as backup to various financial aid tasks.
- Trains and mentors other Financial Aid staff as assigned.
- Performs other duties as assigned.

Supervision Received

Position reports to the Assistant Director of Financial Aid. Position usually works within the framework of responsibilities but may require guidance at times.

Supervisory Responsibility

This position will serve as lead in managing the Work Study Liaisons at each campus may serve as a lead/supervise on projects and/or for other team members/work study.

Special Conditions of Employment

Position will have a username, password and encryption-token access to sensitive and confidential U.S. Department of Education records. Access includes the National Student Loan Data Service (NSLDS), FAA Access to CPS and may also be granted access to Common Origination & Disbursement (COD).

Successful completion of a background check including motor vehicles records report will be required. Incumbents in this position will adhere to all safety and compliance policies of Colorado Mountain College while performing all duties assigned.

Travel within Colorado, the College district/service area, altered work schedules and/or evening and/or weekend hours. The position is expected to travel to financial aid related events, quarterly face-to-face meetings and other training opportunities as directed. Hours can vary based on time of year and student needs. This position will be required to visit our campuses in Western Colorado for certain events or meetings, including new student orientations, visit days or other occasions deemed important by the employee's supervisor.

Working Conditions

This position requires constant sitting, occasional walking, standing and driving; occasional handling objects, pushing/pulling; frequent reaching with hands/arms, and use of finger movements; occasional lifting, carrying, pushing or pulling objects up to 25 lbs; ordinary talking, hearing and full vision capabilities; and the ability to read/comprehend. Write, communicate orally, and reason and analyze constantly; and perform calculations occasionally. Work is performed using a computer and standard office equipment daily and driving a vehicle occasionally.

Professional 413110 @ 110%
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NOTE: This position description is intended to indicate the basic nature of positions allocated to this class and provide examples of typical duties that may be assigned. It does not imply that all positions within the class perform all of the duties listed, nor does it necessarily list all possible duties that may be assigned. Employee may perform other related duties as required to meet the ongoing needs of the organization.