



Classification Description

Job Title: Student Financial Services Specialist II

Pay Grade: 110

Job Code: 4329

FLSA Status: Exempt

Job Purpose

The Student Financial Services Specialist II is a responsible position within the Office of Student Financial Services (SFS). This position has broad knowledge in all aspects of financial aid operations and can demonstrate a solid understanding of policies and procedures related to the operations of the office. The Student Financial Services Specialist II provides processing support, disseminates information to students and other staff, and serves as a mentor to those in the Student Financial Services Specialist I position. Work requires close adherence to financial aid policies and procedures and applicable Federal and State regulations. This position sets the tone for a student-centered, high performance culture that emphasizes excellence in service, quality, productivity, and standards.

General Responsibilities

Essential Functions – General

All staff in the Office of Student Financial Services are expected to serve students in a manner that prepares students for success. Student Financial Services staff will engage in outreach via email communication, call campaigns, and other proactive measures to ensure students are well-informed of their financial aid options and opportunities.

Provides accurate and professional service to students and others seeking information regarding the College's financial aid, admissions, bursar, registration, and enrollment processes.

Student Financial Services staff will provide students with integrated customer service to provide a one-stop service to students related to financial needs, questions, guidance and support.

Responsible for counseling student aid applicants, aid recipients, and their parents with regard to their rights and responsibilities associated with financial aid.

Provides relevant and accurate information in person, by electronic means including email and chat, and by telephone to all assigned inquiries.

Assists students in the application process for financial aid and meeting the eligibility requirements.

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Manages a student caseload (permanently or temporarily) and reviews student applications for financial aid to determine financial need and award aid.

May assist in any of the major program areas of the office. This includes Pell, R2T4, scholarships, student loans, veteran's affairs, verification, and/or work study.

May coordinate the work of Student Financial Services Specialist I's.

Works in conjunction with the Office of Admissions and other offices on student recruitment as it relates to the financial aid process. This includes participating in events on- and off-campus.

Processes Institutional Student Information Report (ISIR) C-codes including selective service issues, Social Security number verification, and citizenship/immigration status.

Assists in the development and implementation of a comprehensive communication plan, and newsletters for the OSFA.

Supports development of content for the Financial Aid website and provides internal customer service to Financial Aid staff with continued review of all updates and changes to the website.

Provides ideas and suggestions for the on-going development and implementation of department Operating Policies & Procedures, forms, and other related documents.

Attends orientation, advising, financial aid, scholarship, and other financial aid-related events College-wide.

Conducts presentations to various groups on financial aid-related topics (FAFSA completion, financial literacy, default prevention, etc.)

Collaborates, partners, and assists with other constituents within the College and in the community regarding FAFSA completion events.

Assists and presents financial aid information to high school students in conjunction with the Office of Admissions.

Participates in the administration of all Federal, Institutional, and State Aid programs at the College.

Assists in the daily operations of the office, as necessary, including front counter student service, phones, mailings, data entry & retrieval, and file organization.

Ensures the maintenance of Federal Student Financial Aid (FAFSA) records and files as they relate to the financial aid programs.

Remains current in the knowledge of and provides accurate information to students and staff related to Federal Pell Grant, Florida grants and scholarships, FSEOG, R2T4, scholarships, student loans, veterans' programs, work study, and College rules and regulations related to financial aid.

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Processes student awards in timely and accurately manner, including determination of eligibility.

Corresponds effectively and in a timely manner with students concerning file status, eligibility, academic progress, and award information.

Enters student financial records and maintains accuracy of database. Performs other duties as assigned.

Essential Functions – May support the following area:

Communication and Outreach – Essential Functions:

Recommends and coordinates training to staff on the various communication channels that include, but are not limited to, QLess, Chatbot, and Live Chat.

Monitors and updates the FSW Knowledge base and the chatbot knowledge base.

Attends recruiting activities held College-wide including, but not limited to, high school visits, open houses, and other recruitment events attended by the Office of Admissions to provide potential students with financial aid information and deadlines to assist them with College choice.

Promotes Financial Aid nights at the high schools.

Maintains an up-to-date outreach data base of high school counselors and other community educators.

Works collaboratively with staff in Financial Aid, Admissions, Student Services, Bursar's Office and Academic Affairs to promote and disseminate financial aid information to students, families and the community.

Designs programs to help students better understand the financial aid process, how to apply for, and maintain their aid.

Develops presentations and presents financial aid information to high school students and their parents in conjunction with the Office of Admissions.

Attends recruiting activities held College-wide including, but not limited to, high school visits, open houses and other recruitment events attended by the Office of Admissions.

Provide potential students with financial aid information and deadlines to assist them with their college choice. This includes participating in events on and off campus. Coordinates these efforts with other enrollment management offices across campus.

For all areas:

Performs other duties as assigned.

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These essential job functions are not to be construed as a complete statement of all duties performed; employees will be required to perform other job-related duties as required. An employee with a disability is encouraged to contact the Human Resources Office to evaluate the job in greater detail in order to determine if she/he can perform the essential functions of this job with or without reasonable accommodation.

Knowledge, Skills and Abilities

Minimum Qualifications

Bachelor's degree from a regionally accredited College or university in a related field.

Two (2) years full-time or four (4) years part-time professional work experience in an office setting. Work experience to include one (1) year working at the professional level in a financial aid office. Appropriate combination of education and experience may be substituted.

Ability to travel independently to other locations for College business.

Demonstrated experience using a personal computer, office software such as MS Office (MS Word, MS Excel) and electronic mail. Computer use includes data entry, word processing and/or accounting functions.

Demonstrated ability to:

- Think critically and creatively, have a high standard of integrity, and be motivated to incorporate best practices into the organizational culture.
- Exhibit a thorough knowledge of policies, procedures, and outside regulations pertaining to the position.
- Possess a working knowledge of operational and fiscal analysis techniques.
- Take initiative and independently plan, organize, coordinate and perform work in various situations where numerous and diverse demands are involved.
- Anticipate, investigate, and analyze problems and address them proactively.
- Communicate effectively, both orally and in writing.
- Establish and maintain effective working relationships with faculty, staff, students and the public.
- Work in a fast-paced, demanding environment.
- Work independently and follow through on assignments.
- Exhibit solid organizational skills and be detail oriented.
- Work with a variety of constituencies and be willing to contribute to a team effort.
- Exercise discretion and good judgment at all times and in all contexts and maintain confidentiality.
- Work effectively with all constituencies of the College.
- Collect, organize, analyze and present information in a meaningful manner.
- Collaborate and be effective working with diverse populations.

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Critical Skills/Expertise

All employees are expected to:

- Promote a common purpose consistent with stated College goals and demonstrate a commitment to students and the learning environment.
- Possess the knowledge of general written standards and procedures utilized, and have the ability to read, interpret, and follow procedural and policy manual related to the job tasks.
- Demonstrate the ability to respond to supervision, guidance and direction in a positive, receptive manner and in accordance with stated policies.
- Provide quality customer service by creating a welcoming and supportive environment.
- Present a professional image in word, action and attire.
- Demonstrate professionalism in dealing with a diverse population while understanding and respecting each other's view of the world, personalities and working styles.
- Conduct oneself in a manner consistent with the College's standards of ethical conduct.
- Apply effective techniques to create working relationships with others to achieve common goals; successfully communicates and collaborates with others to achieve goals.
- Demonstrate skills necessary to look at situations and processes critically to make recommendations for improvement.

Work Conditions/Physical Demands/Special Conditions

Physical: Routinely requires the ability to see, hear, and speak. Routinely requires sitting, bending, stooping, walking. On occasion, incumbents may be required to lift 20 or more pounds.

Environmental: Normal general office.

Mental: Routinely requires the ability to interpret, analyze and perform critical thinking skills.

Approved: September 24, 2024.