



Classification Description

Job Title: Senior Student Financial Services (SFS)
Officer

Pay Grade: 112

Job Code: 4328

FLSA Status: Exempt

Job Purpose

The Senior SFS Officer has administrative responsibilities over specific programs and processes. This position has program responsibility for specific programs and administration of various compliance- and training-related tasks. This position has been trained in all aspects of financial aid operations and demonstrates a thorough understanding of these responsibilities. The Senior SFS Officer provides processing support and disseminates information to students and other staff. The support includes training new staff in the programs for which they are responsible. This position supports one or more areas of specialization within the Office of Student Financial Services. Work requires close adherence to federal financial aid policies and procedures and applicable state financial aid policies and procedures as well as institutional policies and procedures. This position sets the tone for student-centered, high performance culture that emphasizes excellence in service, quality, productivity, and standards.

General Responsibilities

Essential Functions

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 and cashier options and opportunities.

Helps to resolve unusual enrollment history, comment codes, and Federal Pell Grant Lifetime eligibility.

Collaborates with department leadership in the development of the office policies and procedures manual, as assigned.

Collaborates, partners, and assists with other constituents within the College and in the community with regards to financial literacy programs and initiatives.

Collaborates with other appropriate offices on the campus to ensure accurate and timely exchange of information.

SENIOR STUDENT FINANCIAL SERVICES (SFS) OFFICER

Assists in hiring process and provides necessary training to other financial aid staff, as assigned.

Remains current in knowledge of and provides accurate information to students and staff related to Federal Pell Grant, Florida Grants and Scholarships, Veterans Programs, Federal Work-study, scholarships, Federal Supplemental Educational Opportunity Grant (FSEOG), student loans and Federal, State, and College rules and regulations related to financial aid.

Assists with duties related to the annual Single Audit (A-133).

May assist with dependency status petitions.

Oversees a financial aid program area and/or provides support in the verification process.

Supports scholarship programs and processing.

May direct the work of other Student Financial Services staff (primarily Student Financial Services Specialists I's and II's) in performing their duties.

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

Provides relevant and accurate information in person or by electronic means, including email and chat, to inquiries related to tuition fees, cash/credit card payments, refunds, TIP, HIP, 1098T, Bank Mobile, collections, and other student account inquiries.

Assists in the development and implementation of a comprehensive communication plan, and provides write-ups for newsletters for the Office of Student Financial Services.

Advises 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, and by telephone to all financial services inquiries.

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

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

Supports development of content for the Office of Student Financial Services website and provides internal customer service to financial services staff with continued review of all updates and changes to the website.

Provides ideas and suggestions for the on-going development and implementation of Student Financial Services operating procedures, forms and other related documents.

Conducts presentations to various groups on topics related to financial services.

SENIOR STUDENT FINANCIAL SERVICES (SFS) OFFICER

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

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

Ensures the maintenance of Federal student financial aid records and files as they relate to the financial aid programs.

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

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

Enters student financial records and maintains accuracy of database.

Essential Functions – May support one or more of the following areas:

Loans

Provides direct oversight of the loan set-up process for student borrowers. Evaluates requests for, determines eligibility for, and processes student loans; notifies borrowers of any adjustments.

Responds to phone, chat and mail inquiries from borrowers regarding procedures and account status.

Processes the exchange of Federal student loan information to and from the U.S. Department of Education Common Origination and Disbursement (COD) system.

Performs accurate and timely monthly reconciliation between the financial aid system, the College Finance Office, and the U.S. Department of Education systems of student loan disbursements.

Notifies students of exit interview requirement for student loan recipients.

Assists with the administration of the Federal Pell Grant program, the Supplemental Educational Opportunity Grant (SEOG) program and any other Federal grant programs participated in by FSW.

Assists with the monthly fund reconciliation of Federal grant programs, as needed.

Resolves basic issues with and transmits files to and from the Department of Education's Central Processing System (CPS) and COD.

Orders year-to-date files and requests student specific Institutional Student Information Records (ISIR).

Serves as back-up to the Pell Grant processing.

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Verification and Professional Judgements

Reviews Special Circumstances, Unusual Circumstances and Student Academic Progress Petitions.

Responds to student and staff inquiries regarding Professional Judgement Petitions.

Oversees administration of verification and resolution of conflicting information.

Responds to student and staff inquiries regarding Verification.

Pell Grant & Work Study

Processes the awarding, disbursing, and reconciling of the Pell Grant program.

Processes the awarding, disbursing, and reconciling of the Federal SEOG program.

Responds to student and staff inquiries regarding Pell Grant.

Reviews and resolves issues with departmental reports to include: Pell not paid, Frozen B Report, Pell Return/Escheated Funds, Student Forms Correction Error Report, and other related reports as needed.

Collaborates with other College staff to ensure completion of Federal Student Aid programs monthly reconciliation between the financial aid system, the College Finance Office, and the U.S. Department of Education systems.

Resolves basic issues with and transmits files to and from the Department of Education's Central Processing System (CPS) and COD.

Processes the exchange of Federal Pell Grant information to and from the U.S. Department of Education Common Origination and Disbursement (COD) system.

Resolves Pell Potential Overaward Process (POP) issues.

Responds to student and staff inquiries regarding Pell Grant and provides resolution of conflicting information.

Responds to student and staff inquiries regarding Work Study.

Oversees and processes the Federal Work Study Program for the College.

State Programs and Athletics

Monitors and administers Bright Futures and other State financial aid programs to include Financial Aid Fee awards.

Manages the funding for Athletes on student accounts.

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Monitors and manages funds for all scholarships, grants and state programs.

Manages Florida state financial aid programs to include reporting, edits, reconciliation by term and year as required, and requests funding.

Reviews and processes drop petitions as pertains to programs of management.

Coordinates with College officials to acquire funds in place, available awards and other necessary management data.

Serves as the liaison to the athletic department in regards to questions from student athletes and staff regarding financial aid issues.

Responds to student and staff inquiries regarding State Programs and Athletics.

Supports scholarship programs and processing and serves as back-up.

Scholarships and Workforce

Manages and supports scholarships to include:

- Foundation
- Outside Donors
- Institutional funds (Financial Aid Fee Funded)
- Workforce

Oversees the annual process for scholarship evaluation/awards and scholarship fund coordination and management in support of enrollment and retention initiatives.

Oversees and manages the online scholarship application.

Supervises the scholarship selection and award process, leads committee meetings and ensures awards are made on time.

Coordinates scholarship committee meetings, and provides scholarship committee all necessary data for the committee to determine scholarship awards.

Coordinates the scholarship award process for recipients; oversees award letter notification to students and ensures scholarship recipients are informed of donor contact information, when applicable.

Serves as the liaison with local agencies to assist in the receipt and disbursement of all external scholarship funds.

Manages the processing of funds for FSW Workforce Programs.

Coordinates with College officials to acquire funds in place, award availabilities and other necessary management data.

SENIOR STUDENT FINANCIAL SERVICES (SFS) OFFICER

Monitors and manages funds for areas of processing.

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

Responds to scholarship inquiries from students, staff and donors.

Resolves problems related to scholarship transactions.

Responds to student and staff inquiries regarding Scholarships and Workforce Programs.

Manages the processing of funds for the FSW Workforce Programs.

Career Source and Vocational Rehabilitation

Responds to student and staff inquiries regarding Career Source.

Oversees administration of Career Source awarding of funds.

Serves as the liaison with Career Source of Southwest Florida and College.

Responds to student and staff inquiries regarding Vocational Rehabilitation.

Oversees administration of Vocational Rehabilitation awarding of funds.

Serves as the liaison with the Division of Vocational Rehabilitation/Florida Department of Education and the College.

For All Areas:

Performs other duties as assigned.

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 of full-time working at the professional level in a financial aid office. An appropriate combination of education and experience may be substituted.

Ability to independently travel to other locations for College business.

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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.

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.

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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 15, 2024. Revised: September 24, 2024; April 28, 2025; and August 1, 2025.