



Financial Aid Specialist

Job Code: 6750

Salary Grade: S06

FLSA Status: Exempt

The following statements are designed to outline the general functions and typical responsibility levels associated with positions in this classification. They are not intended to serve as an exhaustive list of specific duties or requirements for individual positions assigned to this classification.

Duties and Responsibilities

Processes promissory notes for loans. Coordinates entrance and exit interview processes with students and campus colleges. Coordinates scholarship information. Responsible for various office and financial aid tasks. Performs routine to moderately complex job responsibilities.

- Generates and processes promissory notes.
- Updates system checklists to reflect receipt of documents.
- Coordinates dates with colleges and prepares exit packets for exit loan interviews conducted for students within the colleges.
- Monitors entrance/exit online counseling.
- Updates forms for use on website and office e-files.
- Sends electronic files to ECSI for reporting loan disbursements and exit information.
- Communicates with students concerning additional documentation needed to continue financial aid processing and inquiries regarding load.
- Prints and mails award letters to students daily.
- Responsible for reviewing financial aid e-mails and responding to questions.
- Sends out global e-mail messages to students and groups of students concerning various issues at Director's request.
- Initiates verification process and subsequently reviews verification documentation submitted by student.
- Completes system updates with information submitted for verification and troubleshoots any discrepancies.
- Prepares or coordinates OU Foundation scholarship requests from the various colleges.
- Notifies counselors of these awards so student records can be updated.
- Verifies students' enrollment and accuracy of award.
- Initial contact for students and parents.
- Provides answers for basic application and processing questions to students and parents.
- Provides general office and administrative support by performing various data maintenance, reception, records activities, information distribution, correspondence, and other related support duties.
- Performs other duties as assigned to ensure the overall successful operation of the department.

Minimum Qualifications

Education:

Required: High School Diploma or GED

Experience:

Required: 24 months financial aid general office, clerical, or related experience.

Certifications or Licenses:

None

Verification of education and licensure (if applicable) will be required if selected for hire.

Knowledge, Skills, and Abilities

- Knowledge of financial aid regulations and processes.
- Ability to communicate verbally and in writing.
- Ability to solve problems in a timely manner.
- Customer Service.
- Ability to be patient and handle issues in a professional manner.
- Proficient with Microsoft Office Suite (Word, Excel, and Outlook).

Working Conditions

Physical:

Sitting for prolonged periods. Communicate effectively and listen. Uses a computer and telephone.

Environmental:



JOB DESCRIPTION

The UNIVERSITY of OKLAHOMA

Standard Office Environment.

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