**P3: Level Standards**

**GENERAL ROLE**

This level is accountable for directly providing service to any assigned work unit at the University. The service can focus on a single or a variety of job functions with varying degrees of independence. Positions at this level may supervise student or support employees.

Incumbents:

* Put into effect what is required by defined job duties and responsibilities following professional norms or established procedures and protocols for guidance.
* Alter the order in which work or a procedure is performed to improve efficiency and effectiveness.
* Recommend or implement modifications to practices and procedures to improve efficiency and quality, directly affecting the specific office operation or departmental procedure or practice.

**INDEPENDENCE AND DECISION-MAKING**

*🡪 Supervision Receive*d

* Works under limited supervision.

*🡪 Context of Decisions*

* Utilizes general departmental guidelines to develop resolutions outside the standard practice.

*🡪 Job Controls*

* Possesses considerable freedom from technical and administrative oversight while the work is in progress.
* Defines standard work tasks within departmental policies, practices, and procedures to achieve outcomes.
* Serves as the advanced resource to whom more junior employees go to for technical guidance.

**COMPLEXITY AND PROBLEM SOLVING**

*🡪 Range of issues*

* Handles a variety of work situations that are cyclical in character, with occasionally complex situations.
* Issues are regularly varied.
* Problems tend to be technical or programmatic in nature.

*🡪 Course of Resolution*

* Assesses a variety of situations, and develops resolutions through choosing among options based on past practice or experience.

*🡪 Measure of Creativity*

* Issues are solvable through deep technical know-how and imaginative workarounds.
* Most of the obstacles, issues, or concerns encountered require considering alternative practice or policy interpretation.

**COMMUNICATION EXPECTATIONS**

*🡪 Manner of Delivery and Content*

* Regularly provides information on finished materials to others.

**SCOPE AND MEASURABLE EFFECT**

* Actions regularly affect an individual, item, event, or incident, etc.
* Actions taken are generally done to meet reporting requirements or regulatory guidelines, or to satisfy internal checks and balances and/or existing standards.
* Incumbents have an indirect impact on a larger action or process, such as serving as a single component in an approval process, where the process is “owned” by a different work unit.
* May be designated to guide or organize the work of several employees within the unit.

**Job Template**

**GENERAL SUMMARY**

Provides analysis of financial aid packages. Counsels students and parents and serves as an resource to students, parents, and the public. Oversees one or more of the major specialized areas of financial aid.

**REPORTING RELATIONSHIPS AND TEAMWORK**

Works under limited supervision of a supervisor or manager.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

*The intent of this section is to list the primary, fundamental responsibilities of the job – that is, the duties that are central and vital to the role.*

* Counsels students and parents regarding financial aid application process, sources, and availability of aid, regulations, and other issues pertaining to financial aid.
* Determines financial need and evaluates supporting documentation such as income tax returns, social security statements, divorce documents, unemployment and welfare documents, and tax assessments.
* Assists with the interpretation of and compliance with Financial Aid regulations governing respective program, formulation of policy guidelines, and procedures.
* Stays abreast of federal and state rules, regulations, statutes, and mandates governing various types of financial aid.
* Makes policy change recommendations and implements revisions to procedures.
* Serves as financial aid representative for outreach events.
* Awards and adjusts financial aid packages, as needed.
* Lead student employees and staff as assigned.
* Performs related work as required.

**MINIMUM QUALIFICATIONS**

* Bachelor’s degree in related field.
* Three to four years of related experience.

**COMPETENCIES**

**Knowledge of:**

* Federal and state regulations that govern the administration of financial aid programs
* Financial aid processes
* Microsoft Office and related software applications

**Skill in:**

* Planning and organization
* Conducting research
* Developing and maintaining effective and appropriate working relationships
* Critical thinking, problem solving and analysis

**Ability to:**

* Communicate effectively through both oral and written means
* Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
* Conduct financial aid presentations
* Maintain the confidentiality of information and professional boundaries
* Work independently to analyze available information, draw conclusions and understandings, and present such conclusions effectively to senior management