UNIVERSITY OF SOUTHERN CALIFORNIA

Student Financial Services Counselor

Job Code: 113907

Grade: G
OT Eligible: Yes
Comp Approval: 1/1/2007

JOB SUMMARY:
Provides students with a range of services covering registration, student loans, payment plans, deferments, and pre-payment plans. Monitors student accounts, and counsels students on financial issues.

JOB ACCOUNTABILITIES:

<table>
<thead>
<tr>
<th>*E/M/NA</th>
<th>% TIME</th>
<th>Description</th>
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<tbody>
<tr>
<td>_____</td>
<td>_____</td>
<td>Conducts analysis to determine student financial obligations on individual student accounts. Evaluates eligibility requirements for specific programs based on Federal guidelines and regulations for processing deferments, cancellations, adjustments and postponements. Reviews student promissory notes, payment plan applications, deferment forms and other related documents for completeness and accuracy.</td>
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<td>Counsels students and parents on student financial matters. Offers solutions or alternatives to assist students in settlement of all University financial obligations. Prepares correspondence as required after processing student accounts.</td>
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<td>Evaluates students non-financial issues, and refers students to appropriate University departments. Serves as liaison with other University offices and financial institutions, on behalf of students to facilitate problem resolutions.</td>
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<td>Maintains currency on policies, procedures and regulations pertaining to student loans, payment plans, tuition deferment programs and related services. Interprets University policies and procedures.</td>
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<tr>
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<td>Performs reconciliation of individual student accounts to ensure accuracy of financial records. Verifies and maintains appropriate records of all transactions. Ensures correct billing of individual accounts.</td>
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<td>Makes recommendations to enhance and/or improve student financial services in the areas of counseling, payment plans, student loan processing, tuition deferment programs and other related programs offered or coordinated through the Student Financial Services Office.</td>
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<td>Assists in the preparation of handbooks, fact sheets and brochures. May coordinate production of materials by outside vendors.</td>
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<td>Plans, coordinates, and conducts entrance, exit counseling and orientation programs for students and parents.</td>
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<td>Assists other Financial Services departments during peak periods. Performs other related duties as assigned or requested. The University reserves the right to add or change duties at any time.</td>
</tr>
</tbody>
</table>

*Select E (ESSENTIAL), M (MARGINAL) or NA (NON-APPLICABLE) to denote importance of each job function to position.
EMERGENCY RESPONSE/RECOVERY:

Essential:  
[ ] No
[ ] Yes  In the event of an emergency, the employee holding this position is required to “report to duty” in accordance with the university’s Emergency Operations Plan and/or the employee’s department’s emergency response and/or recovery plans. Familiarity with those plans and regular training to implement those plans is required. During or immediately following an emergency, the employee will be notified to assist in the emergency response efforts, and mobilize other staff members if needed.

JOB QUALIFICATIONS:

Minimum Education:
- High School or equivalent
- Combined experience/education as substitute for minimum education

Minimum Experience:
- 2 Years

Minimum Field of Expertise:
- Directly related experience in student services.

Preferred Education:
- Bachelor's Degree

Preferred Experience:
- 3 Years

Preferred Field of Expertise:
- Experience in student loan processing providing a working knowledge of Department of Education regulations and loan procedures.

Skills:  Administrative:
- Answer telephones
- Balance figures
- Communicate with others to gather information
- Compute totals
- Draft routine correspondence
- Input data
- Maintain filing systems
- Prioritize different projects
- Read handwritten text
- Research information
- Schedule appointments
- Understand and apply policies and procedures
- Use computerized spreadsheets
- Verify calculations

Skills:  Other:
- Analysis
- Assessment/evaluation
- Communication -- written and oral skills
- Conflict resolution
Counseling
Interpretation of policies/analyses/trends/etc.
Organization
Planning
Problem identification and resolution
Public speaking/presentations
Research
Teaching/Training

Skills: Machine:
Adding Machine
Calculator
Computer Network (Department or School)
Computer Network (University)
Personal Computer
Photocopier
Typewriter

Supervises: Level:
May oversee student, temporary and/or casual workers.

SIGNATURES:
Employee: ______________________________ Date: ______________________________
Supervisor: ______________________________ Date: ______________________________

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of personnel so classified.

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