UNIVERSITY OF SOUTHERN CALIFORNIA

Financial Aid Counselor II

Job Code: 137411

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

**JOB SUMMARY:**

Performs need assessment for students requesting financial aid. Provides counseling and/or assistance in matters pertaining to financial aid packaging. As a senior or lead counselor, assists in training and guiding other counselors. Handles complex aid packaging, appeals and special projects as assigned.

**JOB ACCOUNTABILITIES:**

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As a senior or lead counselor, provides training and guidance on financial aid procedures and policies to other counselors and assists in problem resolution. Handles complex financial aid packaging and appeals as assigned. Participates in and/or leads special teams which assist in evaluating, enhancing and or creating new internal practices, procedures and policies.

Conducts need analysis to determine student financial aid packaging options based on individual case circumstances. Reviews student applications for consistency and completeness, verifies accuracy of student and family reported information, and certifies applications. Maintains accurate and thorough file documentation.

Counsels student applicants and parents on matters concerning financial aid packages. Evaluates student problems and requests regarding financial aid awards and takes appropriate action. Integrates financial counseling with student housing circumstances, academic goals, extracurricular plans and career objectives.

Advises students regarding financial planning, budgeting and debt management.

Conducts seminars, workshops and lectures on financing college education for students, parents, high school counselors and university staff.

Processes appeals by reevaluating student aid packages and making award modifications as appropriate and within applicable guidelines and regulations.

Serves as liaison on financial aid matters to assigned campus offices and departments. Provides interpretation of financial aid policies and assists in problem-solving.

Works with other campus student services offices, e.g., admissions, housing, student affairs and financial services, to develop integrated approaches to the delivery of campus student services.

Assists in preparing university publications on financial aid and financial planning.

Maintains currency on financial aid packages, state and federal regulations related to financial aid, and University policies and procedures.
Performs other related duties as assigned or requested. The University reserves the right to add or change duties at any time.

*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:**

- Bachelor's Degree
- Combined experience/education as substitute for minimum education

**Minimum Experience:**

- 2 Years

**Minimum Field of Expertise:**

- Student financial aid counseling

**Preferred Experience:**

- 3 Years

**Preferred Field of Expertise:**

- Prefer USC experience with knowledge of SIS computer system

**Skills: Other:**

- Analysis
- Assessment/evaluation
- Communication -- written and oral skills
- Conflict resolution
- Counseling
- Interpretation of policies/analyses/trends/etc.
- Interviewing
- Knowledge of applicable laws/policies/principles/etc.
- Lead/Guidance Skills
- Organization
- Planning
- Problem identification and resolution
- Project management
- Public speaking/presentations

**Skills: Machine:**

- Adding Machine
- Calculator
Computer Network (University)
Personal Computer
Photocopier
Typewriter
Word Processor

**Supervises:** Level:
Leads one or more employees performing similar work

**Comments:**
Requires strong knowledge of need analysis methodology, USC financial aid packaging schemes, USC financing programs, state, federal and lending institution policies, and USC fee settlement plans.

**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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