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| For Compensation Use Only | |
| Job Code: | 001656 |
| Grade: | EF |
| FLSA Status: | exempt |
| Date: | 8/14/20 |

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| **[Job Title:](http://louisville.edu/hr/employment/comp/job-description-instructions/" \o "Include preferred job title. Compensation will recommend final titles to ensure accuracy and consistency across the university.)** | Coord Fin Aid (Working title: SOM Coordinator of Financial Aid & Financial Wellness)  PCN 00002842 |
| [**Reports To:**](http://louisville.edu/hr/employment/comp/job-description-instructions/) | SOM Director of Financial Aid |
| [**Department:**](http://louisville.edu/hr/employment/comp/job-description-instructions/) | SOM Dean's Office-Student Financial Aid |

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| **I. Job Summary** [*(what is this?)*](http://louisville.edu/hr/employment/comp/job-description-instructions/) |
| This Coordinator position supports the School of Medicine's mission to foster the success and financial wellbeing of our medical students. The SOM Coordinator of Financial Aid & Financial Wellness, manages all primary student contact. Manages and is responsible for the following major areas: financial aid counseling, aid processing and problem resolution, debt management involvement, Financial Wellness/Literacy programing & resources, maintaining & updating the SOM Financial Aid website, and manages the SOM Financial Aid Office, in the Director's absence.  Ensure that all work is done in accordance with Federal Aid regulations/guidelines, LCME accreditation elements and University guidelines. They will provide individual student counseling and assistance to students, involving all aspects of federal aid: loan eligibility & awarding, cost of attendance (COA), calculating aggregate loan limits, Leave of Absence issues and tracking, professional judgements & more. Accountable for accurate and real time data entry, updates and corrections in PeopleSoft software. Excellent general computer skills and ability to adapt to new programs are essential. Proficient in Excel, Word and PowerPoint.  Ensure that Financial Wellness/Financial Literacy programming and resources are provided to students, as required by LCME accreditation. The Coordinator will manage, direct & update current Financial Wellness programming and develop new informational and creative programming & resources for students. Educate, students on the availability of programs and resources to assist them with financial aid, debt management, and financial literacy practices. They will inform and guide students to use resources such as: AAMC Financial Wellness, AAMC.org/FIRST and other internet financial literacy resources. Bring in outside "expert" presentors, in various areas of financial literacy topics. The Coordinator is responsible for all organizational aspects and scheduling of SOM Financial Aid and Literacy events.  Provide support for SOM Director of Financial Aid with scholarship, federal, LCME accreditation reports, Loan Exit, and other reporting duties, as requested. Involved in tracking and compling various student data for the SOM FA Office. Represent the SOM FA Office, at the request of the SOM Director, for various meetings or in the Director's absence.  Manage and responsible for timely updates and additional changes to the SOM Financial Aid website. Responsible for Financial Aid and Financial Literacy publications, to provide students with informational materials. Provide SOM Admissions and other offices with any needed financial aid information documents or etc., as requested.  This position requires a Master's Degree along with experience in Financial Aid or other higher education school setting. This person must demonstrate the ability to lead new initiatives, work closely with others and and maintain collegiality. They must work independently and automously with minimal direction, be detail-oriented, be fiscially accurate, have strong organizational skills, and a desire to work closely with professional students. Strong communication, speaking and presentation skills are required for in person or in virtual settings. This positon will report to and work with the SOM Director of Financial Aid and on occasion, the Associate Dean for Student Affairs to plan and carry out financial aid functions to ensure the SOM is in compliance with federal requirements and offer an informative, positive and supportive environment for all students. |
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| **II. Essential Duties and Responsibilities** [*(what is this?)*](http://louisville.edu/hr/employment/comp/job-description-instructions/#job-title) |
| Provide accurate & knowledgeable Financial Aid counseling and follow-up on all aspects of medical school financial aid, debt management and financial literacy topics for incoming, current (650+ students) and former medical students. Able to provide counseling in person, virtually, by phone & email. Must be able to articulate complex topics such as the COA, tuition & fee structure, federal loan limits and the financial aid package to students.  Advise students on how to navigate financial aid systems during the application process and throughout medical school.  Completing and resolving individual student federal loan issues involving: loan packaging, grad/PLUS credit denials, alternative loan options, aggregate loan limits, request for additional loan offers, canceling loans, student status changes, billing issues, duplicate ID's, withdrawals and etc. Work with other offices: SOM Admissions, SOM Student Affairs, main campus Financial Aid, Registrar, Bursar's Office and others, to resolve complex issues. Accountability for accuracy. Work with students to identify financial concerns, escalating concerns to the Director, as needed.  Entering and updating various data such as AHEC awards, Departmental scholarships, outside scholarship processing, estimated aid, Grad/Plus loan fees and etc. Access to federal NSLDS website. Entering & correcting aggregate loan data in PeopleSoft, per federal NSLDS report data.  Responsible for financial aid and financial literacy content and updates, on the SOM Financial Aid Website  Manage & complete Verification process for PCL and LDS loans and awarding PCL and LDS in accordance with Federal Aid regulations and guidelines.  Attend main campus weekly Financial Aid meetings and financial aid trainings on behalf of the SOM Financial Aid Office. Report meeting information and updates to the SOM Director of Financial Aid.  Proficient in PeopleSoft software for Financial Aid and Bursar's systems. Run Queries for Director, as requested.  Work with other SOM offices, main campus offices, and outside agencies and lenders in resolving complex student aid issues. Assist other SOM offices, as requested.  Manage & complete aid related Professional Judgements in consultation with the SOM Director of FA, federal regulations/guidelines and with main campus FA Policies and Procedures.  Manage, update, and create new Financial Aid Literacy programming and events for medical students. Serve as organizer, presenter/speaker at various SOM events. Events such as: So You Want to be a Millionaire?- Credit Reports & Scores, The Price is Right!-Goals & Budgeting, Fashion $ense Show-Doing more with less!, GEMS Interview Day, MCAT Workshop, Post Bac. Program, Camp Neuro and etc.  Tracking and compiling data for the SOM FA Office needs: loan aggregate debt information and various student status. Manage & schedule financial exit sessions for graduating students and prepare packets with aggregate loan information for SOM Director of Financial Aid.  Other duties and meetings, as assigned by the SOM Director of Financial Aid. |
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| **III. Minimum Requirements** [*(what is this?)*](http://louisville.edu/hr/employment/comp/job-description-instructions/) |
| Bachelor's degree in a related field and five years of related experience. Additional experience may be used on a one-to-one basis to offset the educational requirements.  Proficient in MS Outlook, Word, Excel and PowerPoint.  Adaptable to new computer programs and updates.  Effective oral, written and interpersonal communication skills.  Strong presentation and public speaking skills  Program planning and organizational skills  Understand basic financial concepts and financial literacy topics  Knowledgeable in basic math skills and use of a calculator |
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| **IV. Preferred Qualifications** [*(what is this?)*](http://louisville.edu/hr/employment/comp/job-description-instructions/) |
| Master's Degree- in Counseling, Higher Education, Business or other related degree.  Preferred work experience in Student Financial Aid. However, experience within a University department such as Bursar's Office, Admissions, Student Affairs, Academic Couseling or other student centered industry may be considered.  Familiar with federal website www.studentaid.gov and NSLDS federal data base. PeopleSoft or other educational computer software experience (Banner & etc. ).  Excellent Computer skills.  Will consider candidate with experience outside the University setting that was commensurate with the above description with excellent computer and oral, written & interpersonal communication skills. |
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| **V. Competencies** [*(what is this?)*](http://louisville.edu/hr/employment/comp/job-description-instructions/) |
| Professional: Provide service excellence to students and other staff with exceptional communication and interpersonal skills. Be responsive to student requests and inquiries with accurate information, in a timely manner. Adhere to all Federal Aid Regulations, Confidentiality, Federal Privacy Laws and University of Louisville Policies and Procedures.  Interpersonal: Provide a friendly, supportive and welcoming office for students. Build effective and strong working relationships with students, faculty, staff and outside offices. Strong presentation skills.  Teamwork: Ability to work with others and take directions from others in the interest of moving towards a desired outcome. Receptive to constructive, corrective instruction, if needed, and make changes to better serve students by providing the most accurate aid information and aid processing service. Expect open communication by providing suggestions to help the office, in providing the best experience and service to students.  Proactive: Work independently and autonomously with minimal direction. Be able to anticipate upcoming work flow and plan accordingly. Willingness to learn federal regulations/guidelines and University policies for effective problem-solving.  Organized: Accuracy and analytical thinking is essential in working with federal student aid. Detail-oriented and have strong organizational skills. Provide project management skills in planning and programming for students in areas of financial literacy.  Flexible: Ability to adapt to constantly changing Financial Aid regulations/guidelines and frequent Financial Aid software updates. |
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| **VI. Physical Requirements** [*(what is this?)*](http://louisville.edu/hr/employment/comp/job-description-instructions/) |
| Requires working in a typical office environment with sitting and regular use of a computer and other office equipment. Requires ability to see and hear. Requires occasional standing, stooping and lifting up to 25 lbs. Requires weekly travel between HSC campus and Belknap-Main campus. Requires walking and pushing or pulling a cart between various university buildings. May travel to regional or national Financial Aid related conferences for educational purposes.  Supervisor's Name: Leslie R. Kaein, M.Ed. Phone: 502-852-6161  Supervisor's Sgnature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date Approved: 8-11-2020  Appropriate Administrator's Name: Dr. Olivia Mittel Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_  Administrator's Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date Approved: 8-11-20  Employee's Name: (Vacant April 1, 2020) Phone: 502-852-5187  Employee's Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_  SOM Business Office Signature & Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
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| *The above statements are intended to describe the general nature and level of work being performed by individuals assigned to this job. It is not intended to be an exhaustive list of all duties and responsibilities required of individuals in this job. Other duties may be assigned as determined by management. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties and responsibilities of this job.* |