



NATIONAL AMERICAN UNIVERSITY

POSITION DESCRIPTION

Colorado Springs Campus

Please submit cover letter, resume and employment application to Campus Executive Officer, 5125 North Academy Boulevard, Colorado Springs, CO 80918-4001.

I. POSITION TITLE: Financial Services Representative

II. EMPLOYEE CLASSIFICATION: Classified

III. JOB CLASSIFICATION: Nonexempt

IV. ACCOUNTABLE/REPORTS TO: Campus executive officer, director of student accounts/central admin and director of financial aid/central admin.

V. POSITIONS REPORTING TO THIS POSITION: None

VI. DUTY HOURS: The basic workweek shall be 40 hours (Monday through Friday, 8 am to 5 pm) plus any additional hours as assigned and approved by supervisor.

VII. MINIMUM REQUIREMENTS:

EDUCATION: High school diploma or GED equivalent required; associate degree in Accounting preferred.

EXPERIENCE: Minimum one-year customer service/office experience with good accounting skills. Computer experience required particularly in excel and word.

PHYSICAL: Able to lift up to 30 pounds occasionally and lift up to 10 pounds frequently; able to sit for long periods of time; standing and bending to file; manual and finger dexterity, keyboarding, speaking and hearing.

SKILLS EXPECTATIONS: Strong communication skills. Solid typing and ten-key. Ability to solve basic problems and /or situations. Excellent attention to detail and follow-up. Proven math and accounting skills. Ability to comprehend basic information.

VIII. BASIC FUNCTION/PURPOSE OF THE POSITION: Provide technical assistance in the area of financial aid and student accounts to students attending National American University. Other assistance required in the area of collecting financial aid verification paperwork and contacting students to complete loan counseling and acceptance of their award letter. Monitor all facets of financial aid and student account paperwork for students attending National American University in support of the mission of the university as defined by the university president and the board of governors.

IX. DUTIES/RESPONSIBILITIES/EXPECTATIONS OF THE POSITION:

- * A. Counsels and assists assigned students in handling the student account portion of their school finances through a daily tickler system – contact manager.
- B. Processes and disburses student loan checks and EFT disbursements. Checks student’s attendance and disburses receipts.
- * C. Processes and completes the student account portion of the registration procedure including promissory notes and payment plans.
- * D. Collects balance owed on active student accounts utilizing phone contact, email, regular mail, blocking from class, etc.
- * E. Documents all student contacts and attempts contacts in contact manager for future reference.
- F. Continually reviews student's account to ensure posting of appropriate charges and financial aid payments.
- * G. Prepares and updates collection report with student account and financial aid information and participates in weekly collection report meetings.
- * H. Determines if a student has withdrawn and processes appropriate paperwork. If the withdrawing student is available, reviews account and refund worksheet with the student. Completes refund worksheets, etc. and forwards for further action. Uses non-return list to verify paperwork processed for all students leaving school. Continues to collect on outstanding balances for 90 days.
- * I. Reviews and makes tuition adjustments, employee discounts and other miscellaneous entries.
- J. Prepares invoices for CTA, MTA and VA as assigned.
- * K. Assists new students by providing an estimated needs analysis for incoming students and assists them in applying for Federal Student Aid Programs and/or other programs.
- * L. Counsels and assists campus students in handling their school finances by obtaining signatures on all necessary forms, utilizing Contact Manager as a daily tickler system and documentation of financial aid activity and results of follow up; processes and completes the financial aid portion of the registration procedure; assists with additional loan requests.
- * M. Administers and reviews the verification process by collecting verification documents, insuring all appropriate signatures are obtained; collects verification worksheets, tax returns and W-2s if applicable; and secures dependency documentation if applicable.
- N. Assists students and parents during orientations by conducting group entrance counseling/default management sessions.
- O. Conducts group exit counseling sessions when needed.
- P. Attends state/local financial aid meetings upon request.

- Q. Completes and/or distributes Federal Work Study authorization forms.
- R. Assists veterans in applying for VA benefits according to policies and procedures.
- S. Works effectively with other financial aid employees to ensure that all financial aid paperwork is completed for all students, future and current.
- T. Coordinates front office phone coverage and mailing responsibilities.
- U. Works cooperatively with distance learning and other departments on process improvements.
- V. Other duties as assigned by the associate director or director of financial aid.

X. COOPERATIVE RELATIONSHIPS WITH THE FOLLOWING:

- A. All university staff and faculty including central administration.
- B. All students and parents.
- C. Refer all federal and state agencies and organizations to the director of financial aid/central administration.

XI. LIMITS OF AUTHORITY: As defined by the policies, procedures and practices of the university and/or university president.

National American University reserves the right to alter this position's job description/job duties to meet the needs and goals of the institution.

*Denotes essential elements of the position.