



# NATIONAL AMERICAN UNIVERSITY

## POSITION DESCRIPTION

### Bellevue Campus

To apply submit an employment application ([click here for application](#)),  
resume, and letter of interest to: **Campus Executive Officer**  
**3604 Summit Plaza Drive, Bellevue, NE 68123**

- I. POSITION TITLE:** Financial Services Representative
- II. EMPLOYEE CLASSIFICATION:** Classified
- III. JOB CLASSIFICATION:** Nonexempt
- IV. ACCOUNTABLE/REPORTS TO:** Campus Executive Officer with dotted line authority to the System Director of Student Accounts and the System Director of Financial Aid.
- V. POSITIONS REPORTING TO THIS POSITION:** None.
- VI. DUTY HOURS:** The basic workweek shall be 40 hours plus any additional hours as assigned and approved by the supervisor. Some evening and weekend hours may apply.
- VII. MINIMUM REQUIREMENTS:**
  - EDUCATION:** High school diploma or GED equivalent required; associate's degree in accounting preferred.
  - EXPERIENCE:** Minimum one-year customer service/office experience with proven accounting skills. Computer experience required particularly in Microsoft Excel and Word.
  - BACKGROUND CHECK:** Ability to successfully pass a background check including being in good standing (not in default) on all Title IV Student Loans.
  - 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 & 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 the

student's finance 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. Assist new students by completing an estimated need analysis for incoming students and assist them in applying for Federal Student Aid Programs and/or other programs.
- \* B. Counsel and assist 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 finance activity and results of follow up. Process and complete the finance portion of the registration procedure, obtain NAU promissory notes and payment plans and assist with additional loan requests.
- \* C. Assist with the verification process by collecting verification documents, ensure all appropriate signatures are obtained, collect verification worksheets, tax returns and W-2's if applicable and secure dependency documentation, if applicable.
- D. Assist students and parents during orientations by conducting group entrance counseling/default management sessions.
- \* E. Collect balance owed on active student accounts utilizing phone contact, email, regular mail, blocking from class, etc.
- \* F. Document all student contacts and attempted contacts in Campus Vue Contact Manager for future reference.
- G. Review continually all student accounts to ensure posting of appropriate charges and financial aid payments.
- \* H. Prepare and update collection report with collections and financial aid information and participate in weekly collection report meetings.
- \* I. Prepare invoices for CTA, MTA and VA as assigned.
- J. Complete/distribute federal work study authorization forms, if applicable.
- K. Assist veterans in applying for VA benefits, as applicable.
- \* L. Determine if a student has withdrawn and process appropriate paperwork. If the withdrawn student is available, review the account with the student. Use the non-return list to verify all paperwork is processed for all students leaving the university.
- M. Continue to collect on outstanding balances for 90 days.
- N. Other duties as assigned by campus executive officer.

**X. COOPERATIVE RELATIONSHIPS WITH THE FOLLOWING:**

- A. All NAU 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.