FINANCIAL SERVICES REPRESENTATIVE
Position Description

Summary
The Financial Services Representative provides technical and other assistance in the area of financial aid to students attending National American University in accordance with the mission, core values, and purposes of the university.

Minimum Qualifications
The Financial Services Representative must satisfy the following minimum qualifications:
1. Bachelor’s degree or equivalent combination of education and/or experience required.
2. One-year prior finance or financial services experience with strong accounting background preferred experience.
3. Customer service experience preferred.
4. Ability to successfully pass a background check including being in good standing (not in default or overpayment) on all Title IV funds.

Skills and Attributes
The Financial Services Representative possess the following skills and attributes: solid typing and ten-key skills; ability to solve basic problems and/or situations; excellent attention to detail and follow up; ability to comprehend basic information; proven math and/or accounting skills; excellent customer service and communication skills; computer experience required particularly in Microsoft Excel and Word.

Essential Functions
The Financial Services Representative performs the following essential functions:
1. Assists new and continuing students by completing an estimated need analysis and assists them in applying for Federal Student Aid Programs and/or other programs.
2. Counsels and assists 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. Collects required student documents utilizing phone contact, email, mail, blocking from class, etc. Processes and completes the finance portion of the registration procedure, obtains NAU promissory notes and assists with additional loan requests.
3. Assists with the verification process by collecting documents (ie: verification worksheets, tax returns and W-2’s, if applicable), ensuring all appropriate signatures are obtained, and secures dependency documentation, as needed.
4. Assists students and parents during orientation by conducting group entrance counseling/default management sessions.
5. Reviews, daily, all student accounts to ensure posting of appropriate charges and financial aid payments.
6. Prepares and updates collection report(s) with collections and financial aid information and participates in weekly collection report meetings.
7. Completes, distributes and collects signed federal work study authorization forms, if applicable.
8. Determines if a student is or has withdrawn, follows up with possible late disbursement, cancels future and/or current aid, as appropriate, reviews students account and processes exit counseling and reviews all information with the student, if available.
9. Reviews NSLDS (National Student Loan Data System) to ensure proper financial aid awarding.
10. Prepares, reviews and awards assigned student packages.
11. Reviews FA checklist to ensure all required documents are received and completed properly.
12. Documents within university’s database, contact manager, with proper financial aid activity and results of follow up.
13. Maintains availability to travel to university campuses for training and assistance or other state/local financial aid meetings.
14. Ensures that the financial packaging process is completed each quarter for all future and current students, as assigned.
15. Ensures that student aid packaging/processing guidelines are in compliance with federal, state and institutional rules and regulations.
16. Performs other duties as assigned.

**Required Work Hours**

Forty hours per week during daytime, evening, and weekend hours. Scheduled work shifts will be between the hours of 6:00 a.m. and 7:00 p.m. and may change. Overtime may be required, or permitted with prior approval.

**Reporting and Supervisory Responsibilities**

1. The Financial Services Representative reports to the Financial Services Manager.
2. This position has no supervisory responsibilities.

**Physical Requirements**

The Financial Services Representative must be able to speak, hear, see, write, read, type, dial, reach, and bend.

**Travel**

Periodic travel, including airline travel and overnight stays, may be required.