

STAFF Position Description

Instructions: Complete this form for all staff positions. The form is also used to request a classification review of a currently filled position, or to update a position description with no review requested. After completion of the form, a signed copy should be given to the employee (if the position is filled), one copy forwarded to the Office of Human Resources, and the original electronic version maintained by the department. [NOTE: This form is unlocked; you will need to Double-click check boxes in order to check, and Ctrl + Click to open links.]

A. Action Requested

- Request a New position OR Fill a Vacant position (Must initiate through online recruitment)
 Initiate a Classification Review for a filled position

Requestor: <input type="checkbox"/> Employee OR <input type="checkbox"/> MPP Administrator	Name:
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- Update an existing position description (no review requested)
 New Employee/Appointment acknowledgment of the position description (no review requested)
 (Employee should be given full position description within 7 working days of start date)

B. Current Information

Name of current incumbent: (if filled)		Employee ID #:	
Or if vacant, name of previous incumbent: Sarah Perez			
Classification Title: Student Services Professional II	Job Code: 3082	Grade: 1	Position #: 99740866
Working Title: (optional) Financial Aid Counselor		FLSA Status: Exempt <small>(See CSU FLSA/Job Code List - csun.edu/careers/resources-links)</small>	
Department ID: 10195	Department Name: Financial Aid & Scholarship		Time Base: 1.0
Lead (non-MPP Reports To, if applicable) Name:	Classification Title:	Working Title:	
MPP Administrator/Department Chair (Reports To) Name: Domenica Majalca	Working Title: Associate Director, Student Relations & Financial Literacy		

Please attach an org chart, if requesting a reorganization (current and proposed) (See [Campus Org Chart](#) - csun.edu/hr/orgchart)

Is this a sensitive position as designated by the CSU? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (See Sensitive Table - csun.edu/hr/background-checks)

C. Position Purpose (Hint: Complete Section D. first and then summarize; typically between 2 to 5 sentences)

Please briefly describe the primary function, nature, and scope of the position.

Under general direction of the Associate Director Student Relations & Financial Literacy, the Counselor will serve as a member of the counseling unit of the Financial Aid and Scholarship Department. The counseling unit is responsible for independent student advisement and finalization of approximately \$300 million annual awards of grants, loans, scholarships and work-study. The Financial Aid Counselor must provide quality customer service to prospective, and continuing students regarding financial aid eligibility, analyze federal financial aid applications to determine a student’s financial need, prepare and award financial aid packages, and perform all duties related to the financial aid process. Counselors must interact in a professional manner with students and parents in challenging situations to help them resolve financial issues relating to financial aid eligibility and monetary awards. Working independently under general supervision, the counselor applies a broad understanding of student aid program practices and policies including federal, state and university regulations to determine appropriate allocation of aid awards, authorize exceptions, and provide individual counseling on non-routine, sensitive aid issues. The Counselor will ensure compliance with federal regulations, state law, CSU Executive Orders, and institutional policies, communicate with campus offices and departments, and participate in campus and community outreach activities.

D. Major Duties

Describe each major set of responsibilities assigned to this position (typically 4 to 7) listing them in order of importance. Indicate the approximate percentage (minimum of 5% for a given major duty, with the total equaling 100%) of time spent in each area of responsibility, estimated over a year timeframe. Miscellaneous or other duties as assigned should be 5%.

Indicate duties, which are “essential functions” by checking the Essential box in the right column (15% or greater to be considered essential).

The Americans with Disabilities Act (ADA) provides that there shall not be a barrier to employment for an otherwise qualified disabled individual who is able to perform the "essential functions", which is intrinsic to the work. A function may be essential because 1) the position was established to perform the function; 2) a limited number of employees are available to perform the function; and/or 3) removing the function would fundamentally change the position. (Example: A receptionist must be able to respond to in-person, telephone and electronic inquiries).

Description of Duties	% of Time Total = 100	Essential (Minimum 15%)
<p>COUNSELING FUNCTIONS:</p> <p>Provides counseling and advisement in individual and group sessions to financial aid applicants, recipients, and the general student body on all complex financial aid related matters such as financial aid application procedures, available financial aid funding options and eligibility requirements, Satisfactory Academic Progress requirements, things that can impact a student's aid eligibility, and budgeting/money management. The Counselor is responsible for review and judgments for approval or disapproval of all appeals of exceptions to financial aid policies.</p> <p>The Counselor provides counseling, analysis and solutions for student/parent money related matters, on academic progress, and personal financial counseling. The Counselor must be familiar with University and community resources to be able to make appropriate referrals. This position demands skillful use of interviewing techniques, good judgment, knowledge of federal, state, chancellor office, and institutional policies and regulations and a strong commitment to caring about and for the student, the Financial Aid & Scholarship Department and the University. The student population of the campus poses different counseling challenges and situational need identification: first generation college students; older, returning students; hearing-impaired; disabled; and veteran student populations can require alternative communication skills and empathy.</p> <p>Assists at the counter and telephone in the Financial Aid & Scholarships Department when needed and speaks at workshops on and off campus: trains professional and peer counselors in campus programs; estimates award eligibility for continuing and prospective students; identifies unusual circumstances and identifies options for appropriate resolutions and guides students through the financial aid process. Must be attentive to the total needs of the student to facilitate problem. Special perception and communication skills are required to explain and interpret the complexities of the financial aid service area in a manner that avoids frustrating, embarrassing, or confusing the applicant. The Counselor must deal with the reality that a student's problem may transcend the abilities of all concerned to find workable solutions where none seem to exist.</p>	45%	<input checked="" type="checkbox"/>
<p>COMPLIANCE FUNCTIONS:</p> <p>Reviews the complex information from the FAFSA (financial aid application); verifies information for students selected by the Department of Education based on the analysis of support documents (e.g., tax forms, untaxed income verification); resolves conflicting information; if warranted, re-computes the need analysis computation; determines the budget category and any appropriate/allowable adjustments; manually awards the student if needed. Required knowledge of different application forms and supporting documents such as tax documents and any other documents required for verification; various citizenship and DHS documents, and various internal office forms.</p> <p>The Counselor coordinates financial aid funds with funding from internal and external agencies. Required knowledge of Need Analysis, eligibility criteria for aid sources, Satisfactory Academic Progress regulations and policies, FERPA, CSUN Policies and procedures. Work edit reports generated by automated system; manually authorize and disburse aid; utilize professional judgment as prescribed by law to make exceptions, and document all actions and decisions in electronic system.</p> <p>The Counselor explains policies and awards to students and families, including complex federal and state regulations and institutional policies. The counselor is responsible for knowing and understanding regulations as well as having the ability to communicate complex information. The Counselor advises students on their legal rights, responsibilities, and options as financial aid recipients. Maintains and modifies aid package as needed. Required knowledge of CSUN policies and procedures, alternative funding sources, quality assurance policies, and other relevant information. Modifications frequently require creative problem solving and handling caused by student initiated changes, other resources, document initiated changes, administrative adjustments, Stafford Loan/PLUS Loan applications, review of the financial aid applicant's electronic record, and Satisfactory Academic Progress Review. Assists other sections of the office when needed.</p> <p>Participates in testing system upgrades and modifications, suggests enhancements and changes to policy and/or procedures, and serves on department and campus committees.</p>	35%	<input checked="" type="checkbox"/>
<p>ADMINISTRATIVE FUNCTION:</p> <p>Under the general supervision of the Associate Director Student Relations and Financial Literacy, Counselors accept the responsibilities of "backing-up" each other handling their primary caseloads. Counselor staff meetings are held weekly to facilitate the creative development of Financial Aid & Scholarship Department policies and procedures. The Counselor attends in-house and regional training</p>	15%	<input checked="" type="checkbox"/>

sessions, administers research projects, participates in speaking engagements, serves on departmental and other University search and screen committees, serves on professional committees and as panelist and moderator in professional workshops and conferences. Maintains professional knowledge through readings, workshop and conference attendance and active participation as a member of professional associations.		
Performs other duties as assigned.	5%	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

E. Physical and Cognitive Demands; and Environmental Conditions

Check the appropriate box for each of the following items that most accurately describes the minimum extent of the specific activity performed by this position. Based on a typical workweek.

PHYSICAL DEMANDS	Greater than 50%	Less than 50%	N/A		Greater than 50%	Less than 50%	N/A
1. Key Boarding and Mousing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
2. Repetitive Motion of upper extremities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12. Lifting or Carrying			
3. Hearing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	A. Up to 10 lbs.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Sight	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	B. Up to 25 lbs.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5. Sitting	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	C. Up to 50 lbs.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
6. Standing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	D. Over 50 lbs.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7. Walking	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	13. Pushing or Pulling			
8. Bending (from waist or neck)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	A. Up to 10 lbs.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9. Climbing Ladders	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	B. Up to 25 lbs.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10. Stooping, Kneeling, or Squatting	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	C. Up to 50 lbs.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11. Reaching above shoulder level	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	D. Over 50 lbs.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

ENVIRONMENTAL CONDITIONS	Greater than 50%	Less than 50%	N/A
1. Inside (Typical office environment)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Elevated Work (Raised platform/scaffold)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3. Extreme Temperature (hot or cold)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4. Outdoor	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5. Hazards	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

OTHER Describe any additional demands/conditions or special circumstances that are pertinent to the position.
n/a

F. Equipment

List any special software and machines, tools, and equipment used on a regular basis.

Type	Purpose and Desired Results
Example A1) Lawn Mower Example B1) Microsoft Word	Example A2) Mowing grass Example B2) Create or update documents
Working knowledge of data processing systems; mainframe and LAN environments; and PC-based operation	Financial aid and scholarship processing and management
Oracle’s PeopleSoft (SOLAR), Excel, Word, OnBase Imaging, AcademicWorks	Financial aid and scholarship processing and management

G. Training and/or Licenses; and Additional Knowledge, Skills, Experience

(A). **Training and/or Licenses:** List required and preferred training, licenses or certifications. If a license is required for any position outside of the [CSU Professional License Table \(www.calstate.edu/hr/pims/pims/appendix/professional_license_table.htm\)](http://www.calstate.edu/hr/pims/pims/appendix/professional_license_table.htm), a justification must be provided in description. *Any CSU/CSUN “Required” training will be provided after starting the appointment.

	Required	Preferred	N/A
*CSU Sexual Harassment Prevention / Title IX / Data Security Training (Required for ALL employees)	<input checked="" type="checkbox"/>		
*CSUN Defensive Driver Training and Powered Cart/Low Speed Vehicle Safety Training (if appl)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
*CSUN Procurement Card (P-Card) Training	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(B). Additional Knowledge, Skills, and Experience: List additional knowledge, skills, and experience. Human Resources will determine the minimum qualifications based on the CSU Classification Standards.

B.A required; Master's degree desirable; in-depth knowledge of regulations in interpreting and administering of federal Title IV, state and university financial aid programs to ensure compliance required. Working knowledge of advising and counseling techniques. Active listening skills. Possesses strong customer service orientation skills. Strong written and verbal communication skills. Ability to learn quickly and retain complex information. Must be an independent learner. Must have a positive attitude and be a team player.

H. Lead or Oversight of Other Positions Yes No (Please list below)

List positions (including Student Assistants) that incumbent will lead, oversee or provide direct or general work direction, if applicable. (Generally, non-MPP Staff may lead, oversee, coordinate, and provide input for hiring and evaluations to MPP Administrators. Management and supervision authority is held at the MPP Administrator level.):

Name (if applicable)	Job Title	Position #

I. Changes in Position

If this is an existing position that you believe has changed, what specific duties or responsibilities have been changed, added to, or removed since the position was reviewed previously or since the incumbent was assigned?

J. Signatures (Print, sign and date below)

EMPLOYEE (Acknowledgement of reading and receiving a copy of this job description)

Employee:	Signature:	Date:	Extension:

LEADS / MPP ADMINISTRATORS (Acknowledgement that the information is accurate)

Non-MPP Lead (if applicable):	Signature:	Date:	Extension:
1 st level MPP Administrator/Dept. Chair (required): Domenica Majalca	Signature:	Date:	Extension:
2 nd level MPP Administrator (if applicable): Shelline Warren	Signature:	Date:	Extension:
3 rd level MPP Administrator (if applicable): David Dufault-Hunter	Signature:	Date:	Extension: