

## FINANCIAL AID LEADER JOB DESCRIPTION

**Qualifications:** Bachelor's degree or equivalent experience is recommended. The Financial Aid Leader must demonstrate human relations and effective communications skills and the ability to work with a diverse population of students. He or she must be able to learn and understand federal and state regulations and financial aid procedures that are critical elements to this position. Computer and data entry skills are required.

### Objective

The Financial Aid Leader creates and implements a customer-focused financial aid plan that supports the Paul Mitchell Schools' culture, the admissions process and service in the school, and its Future Professionals. He or she demonstrates integrity, ethical behavior, and a high level of confidentiality in recognizing and working with confidential information and records concerning the personal finances of Future Professionals.

### Financial Aid Leader — Essential Functions

- ❶ The Financial Aid Leader meets with all Future Professionals to discuss tuition payment options including financial aid.
- ❷ He or she inspects that the school catalog and enrollment contract are up to date and that all Future Professionals sign and initial the required enrollment contract prior to enrolling. He or she maintains Future Professional files with all required information and inspects that satisfactory academic progress (SAP) is maintained by all Future Professionals. He or she meets each week with the school's leadership team to discuss those Future Professionals who are not maintaining satisfactory progress and need to be placed on probation.
- ❸ He or she prepares all paperwork pertaining to grants and loans.
- ❹ He or she works with Future Professionals to collect the required verification documentation and complete the verification process.
- ❺ He or she certifies **or** disburses (but not both) federal aid funding to the school and maintains proper documentation.
- ❻ He or she counsels and advises Future Professionals and parents on financial aid eligibility guidelines and available programs, including tuition, loans, verification, and payment plans.
- ❼ He or she knows and understands the Freedom system and enters all Future Professional data into Freedom.
- ❽ He or she understands how to complete the FAFSA, Master Promissory Note, and Direct Loan Counseling Guide. He or she must be able to assist Future Professionals in completing their own FAFSA.
- ❾ He or she collects **or** posts Title IV and non-Title IV tuition payments (but not both) and verifies that all students are current with tuition payments.
- ❿ He or she has excellent interpersonal, oral, and written communication skills and can effectively convey and exchange information.
- ⓫ He or she can interpret, apply, and comply with federal, state, and institutional regulations governing student financial aid and maintains a current working knowledge of guidelines and regulations related to financial aid.
- ⓬ He or she downloads hours on the first day of each week and calculates both actual and possible student hours. He or she is responsible to close the week no later than the following Wednesday.
- ⓭ He or she inspects that Future Professionals are meeting the Satisfactory Progress Requirements prior to disbursing any Title IV funds.
- ⓮ He or she performs and assists in reviewing financial aid satisfactory progress appeals.

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- 15 He or she provides support for various operational and problem-solving functions such as working reports and performing basic needs analysis.
- 16 He or she assists with policy and procedure development as needed.
- 17 He or she prints monthly Satisfactory Progress Reports (to be distributed in Theory), advises Future Professionals who are unsatisfactory, and completes probation forms for all Future Professionals who do not meet satisfactory standards.
- 18 He or she is continually aware of and communicates with the School Director about Future Professionals not attending school. If Future Professionals miss one week of school, the Future Professional Advisor should contact them; the Future Professional must be dropped from the program after missing 14 consecutive calendar days and can restart if he or she returns.
- 19 He or she properly and promptly closes out the records of Future Professionals who graduate, withdraw, or are terminated from the school; completes all necessary paperwork; and gives necessary refunds within 30 days.
- 20 He or she can run reports concerning SAPS/loans/Pell Grants as needed.
- 21 He or she conducts the Future Professional graduate exit interview.
- 22 He or she attends Pow Wow, team training, weekly management meetings, monthly Town Hall meetings, FUNraising, Free Hugs, Caper, Super Service Days, Super Service Nights, graduation, and celebrations to sustain the school culture.
- 23 He or she may be asked to perform other tasks as needed that do not appear on the job description.

\*\*Work is performed in an indoor environment and requires frequent sitting, standing, bending, walking, repetitive motion, and vision to monitor. \*\*

\*\*He or she travels domestically for recruitment and professional development. \*\*

\*\*Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.\*\*

### Additional Responsibilities

- 1 The Financial Aid Leader can multitask, set priorities, and meet deadlines in a fast-paced environment.
- 2 He or she attends accrediting agency, Department of Education, and regulatory conferences/trainings.
- 3 He or she participates in all school audits.
- 4 He or she answers phones and e-mails and returns messages in a timely manner of no more than 24 hours.
- 5 He or she Creates Magic! in the clinic classroom and in the classroom on a regular basis.
- 6 He or she maintains an organized and effective office.
- 7 He or she conducts regular inspections of the financial files for compliance with all required documentation.
- 8 He or she develops and maintains relationships with appropriate school management and team members.
- 9 He or she has a working knowledge of financial aid federal regulations and office policies and follows precise processes and procedures.
- 10 He or she has knowledge of current regulations pertinent to the release of student information.

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#### Admissions Support

- ① The Financial Aid Leader works with the admissions department to complete the enrollment process.
- ② He or she maintains and updates the school's CRM on a daily basis.
- ③ He or she completes the contract packet and e-mails it to Future Professionals within 48 hours after a tour.  
The contract packet includes:
  - Contract
  - Catalog
  - Drug-Free Workplace Policy
  - Campus Safety and Security Policy and Fire Safety Report
  - Financial welcome letter, etc.
  - Financial Aid Leader contact information
- ④ He or she meets daily and weekly with the admissions team for upload and download meetings about upcoming tours, starts, applicants, etc.
- ⑤ He or she is highly knowledgeable and experienced and utilizes all financial aid tools, *Guide 11: Operations*, and the Enrollment Team Newsletter.