



Advisor, Student Financial Services

Job Description

JOB INFORMATION

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| <i>Job Code:</i> | 137420 |
| <i>Job Title:</i> | Advisor, Student Financial Services |
| <i>FLSA Status:</i> | Non-Exempt |
| <i>Supervisory:</i> | May oversee student, temporary and/or resource workers. |
| <i>Job Family:</i> | Financial Aid |
| <i>Job Family Group:</i> | Academic Advising and Career Counseling |
| <i>Management Level:</i> | 8 Individual Contributor |
| Advisor, Student Financial Services | |

JOB SUMMARY

Responsible for providing comprehensive customer service and support on all financial matters (e.g., tuition, fees, payments. Implements proactive communications (e.g., emails, walk-ins, orientation presentations), interpreting policies and providing guidance to all relevant stakeholders. Counsels students regarding payment options for overdue accounts, student loans, and reconciliations. Collaborates with various units and programs to resolve student debt issues.

JOB QUALIFICATIONS:

Education

| <i>Req</i> | <i>Pref</i> | <i>Degree</i> | <i>Field of Study</i> | |
|------------|-------------|---------------------------|-----------------------|----|
| X | | High school or equivalent | | |
| | X | Bachelor's degree | | In |
| | X | | Finance | Or |
| | X | | in related field(s) | |

Additional Education

Check here if experience may substitute for some of the above education.

| | |
|--------------------------|---|
| <input type="checkbox"/> | Combined experience/education as substitute for minimum education |
|--------------------------|---|

Work Experience

| <i>Req</i> | <i>Pref</i> | <i>Work Experience</i> | <i>Experience Level</i> | |
|------------|-------------|------------------------|-------------------------|--|
| X | | 1 year | | |
| | X | 3 years | | |

Additional Work Experience

Check here if education may substitute for some of the above work experience.

| | |
|--------------------------|---|
| <input type="checkbox"/> | Combined experience/education as substitute for minimum work experience |
|--------------------------|---|

Knowledge, Skills and Abilities

| Req | Pref | Functional Skills |
|-----|------|--|
| X | | Ability to interpret, review, and evaluate complex financial documentation and policies accurately. |
| X | | Exceptional customer service and interpersonal skills. |
| X | | Thorough working knowledge of all relevant state/federal regulations pertaining to student data (e.g., the Family Educational Rights and Privacy Act of 1974, or FERPA). |
| X | | Demonstrated attention to detail. |
| X | | Excellent organizational and problem-solving skills, able to prioritize among several tasks. |
| X | | Exceptional written and oral communication skills, able to share sensitive/complex information in a confidential and straightforward manner. |
| X | | Familiarity with higher education environments, policies and procedures. |
| X | | Extensive experience with Microsoft Office and relevant financial software. |
| | X | Experience with relevant software, systems and platforms (e.g., Workday, Flywire, Transact Cashnet, ECSI). |
| | X | Experience with scanning and indexing data(e.g., DexFlow images). |

Other Job Factors

JOB ACCOUNTABILITIES

| | % Time | Essential | Marginal | N/A |
|---|--------|-----------|----------|-----|
| Advises students on financial obligations, payment procedures, and options available. Interprets relevant policies and provides guidance to all relevant stakeholders. Reviews documentation for accuracy and completeness when processing adjustments, cancellations, deferments and postponements. Initiates skip tracing as needed. | | | | |
| Processes billing (e.g., adjustments, deferments, invoices) and reconciles discrepancies. Waives late fees and charges when justified through investigation or analysis, ensuring compliance with predetermined guidelines. Notes and informs management of uncollectable accounts for review. | | | | |
| Negotiates customized payment plans and possible revisions to existing agreements. Escalates items as required while following cases through to resolution. Exercises judgment and maintains legal compliance when interpreting regulations for individual/specific situations and demographics. | | | | |
| Monitors accounts to ensure adherence to internal/external procedures and regulations. Updates or corrects student accounts (e.g. lift holds, adjust payments, revise payment plans). Manages and maintains communication with students (e.g., promissory notes). | | | | |
| Identifies and recommends improvement opportunities for system processes and procedures to enhance the customer experience. | | | | |
| Stays current with regulatory changes and emerging issues, helping ensuring compliance with requirements and assess any impact to operations. Promotes an environment that fosters inclusive relationships and creates unbiased opportunities for contributions through ideas, words, and actions that uphold principles of the USC Code of Ethics. | | | | |

Other Requirements

| Essential: | Emergency Response/Recovery | Essential: | Mandated Reporter |
|------------|--|------------|---|
| | In the event of an emergency, the employee holding this position is required to "report to duty" in accordance with the university's Emergency Operations Plan and/or the employee's department's emergency response and/or recovery plans. Familiarity with those plans and regular training to implement those plans is required. During or immediately following an emergency, the employee will be notified to assist in the emergency response efforts, and mobilize other staff members if needed. | | A mandated reporter who in his or her professional capacity has knowledge of, or reasonably suspects a person who is under the age of 18 years, elderly, or a dependent adult has been the victim of abuse or neglect must report the suspected incident. The reporter must contact a designated agency immediately or as soon as practically possible by telephone or in writing within 36 hours. By virtue of the associated job duties, this position qualifies as a mandated reporter as required by state law and USC's policy at: https://policy.usc.edu/mandated-reporters/ |

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|--|-------------------|
| <i>Campus Security Authority (CSA)</i> | <i>Essential:</i> |
| By virtue of the associated job duties, this position qualifies as a Campus Security Authority as required by law and USC's policy at: https://dps.usc.edu/alerts/clery/ | |

ACKNOWLEDGMENTS

The above statements reflect the essential and non-essential functions as necessary to describe the principle contents of the job. They are not intended to be a complete statement of all work requirements or duties that may be required of the position. I understand that I may be asked to perform other duties as assigned. USC reserves the right to add or change duties at any time.

The University of Southern California is an Equal Opportunity Employer. USC prohibits discrimination on any basis protected under federal, state, or local law, regulation, or ordinance or university policies. All employment decisions are based on individual qualifications and business need.

I acknowledge receipt of this job description and its associated physical requirements. I have read and understand the job description and job requirements and agree to abide by their contents. I realize that duties may be requested of me that are not specifically stated herein. I understand that I will be expected to adjust to potential fluctuations in work volume. I understand that, if I have any questions about the essential functions or expectations of my position, my supervisor and/or HR partner are available to discuss them with me.

| | | |
|------------------------------|--------------------|---------------|
| _____ Print Employee Name | _____ Signature | _____ Date |
| _____ Print Manager Name | _____ Signature | _____ Date |

This job description describes the general nature and level of work required by the position. It is not intended to be an all-inclusive list of qualifications, skills, duties, responsibilities or working conditions of the job. The job description is subject to change with or without notice, and Management reserves the right to add, modify or remove any qualification or duty. Nothing in this job description changes the existing at-will employment relationship between the university and the employee occupying the position.