



## Senior Advisor, Student Financial Services

### Job Description

#### JOB INFORMATION

<i>Job Code:</i>	137423
<i>Job Title:</i>	Senior Advisor, Student Financial Services
<i>FLSA Status:</i>	Non-Exempt
<i>Supervisory:</i>	Leads one or more employees performing similar work.
<i>Job Family:</i>	Financial Aid
<i>Job Family Group:</i>	Academic Advising and Career Counseling
<i>Management Level:</i>	8 Individual Contributor
Senior Advisor, Student Financial Services	

#### JOB SUMMARY

Responsible for providing comprehensive customer service for all student financial matters and resolving complex billing/payment issues. Develops varied reporting tools for distribution and ensures data accuracy. Provides dashboard metrics to management and assists with data interpretation. Collaborates with leads in 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		Bachelor's degree		
	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.

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		3 years		
	X	5 years		

##### Additional Work Experience

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

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		Demonstrated expertise in 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., Visio, 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
Provides highly specialized expertise to students regarding financial accounts, procedures and programs. Reconciles funds as appropriate or directed. Counsels students with overdue accounts. Monitors accounts and service delivery, setting priorities and deadlines. Helps managers/leaders coordinate schedules, evaluate team performance, and implement strategic initiatives.				
Works to resolve complex issues and interpret matters not clearly defined. Notes and informs management of uncollectable accounts for review and assignment to collectors. Manages collections activity (e.g., sending invoices, reconciling records), maintaining accurate and complete data. Oversees accounts designated as bankrupt, informing relevant stakeholders (e.g., Office of General Counsel) and regularly reviewing documentation as needed.				
Processes billing (e.g., adjustments, deferments, tuition statements) and resolves discrepancies. Waives late fees and charges when justified through investigation or analysis, ensuring compliance with predetermined guidelines. Negotiates customized payment plans, revises existing agreements, and initiates skip tracing as needed.				
Communicates with numerous internal/external stakeholders, keeping students and families informed of obligations. Helps students calculate expenses and negotiates customized payment plans. Ensures adherence to agreed-upon schedules and revises agreements as needed. Initiates skip tracing and lifts holds as appropriate or required.				
Manages and maintains payment platforms and documentation (e.g., transactions, reports), gathering and sharing data accordingly. Audits retired databases, researching debt origins and reconciling discrepancies.				
Stays current with regulatory changes and emerging issues, helping ensuring compliance with requirements and assess any impact to operations. Ensures timely invoices and data security. Continuously identifies improvement opportunities for systems and procedures.				
Exercises judgment and maintains legal compliance when interpreting regulations for individual/specific situations and demographics. 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		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,

**Other Requirements**

<i>Essential:</i>	<i>Emergency Response/Recovery</i>	<i>Essential:</i>	<i>Mandated Reporter</i>
	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.		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: <a href="https://policy.usc.edu/mandated-reporters/">https://policy.usc.edu/mandated-reporters/</a>
<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: <a href="https://dps.usc.edu/alerts/clery/">https://dps.usc.edu/alerts/clery/</a>			

**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.