Office of
Student Financial Aid
UNIVERSITY OF WISCONSIN–MADISON

Job Description
Federal Awards Loan Processor – Lead/Advanced

Department Overview: Office of Student Financial Aid

In this role, you will responsible for processing private and Federal Direct PLUS loans through specific software and loan websites. You work directly with students, parents, loan lenders, and other staff(s) as it pertains to any Federal Direct loans and private loans and issues that may arise regarding them. You will provide prompt, efficient, and accurate support to our customers from the application stage and finding the loan that best fits their need to informing loan repayment(s). You will prepare, scan, and upload documents into electronic storage using the document imaging software. You will also play a key role in maintaining the Office of Student Financial Aid's missions and goals as it affects all customers' financial goals.

Qualifications:

- Must be a UW- Madison student
- Proficient in Microsoft Office
- Must be Detail- oriented and have organizational skills
- Be able to multi-task
- Excellent verbal and written communication skills
- Knowledge of financial aid, federal direct loan programs, and private loans
- Knowledge Student Information System (SIS)
- Customer service experience (phone, face-to-face, and/or email)
- Previous financial aid experience
- Basic math skills required
- Be able to present and train team members, other units, and/or departments

Job Duties & Responsibilities:
To succeed in this position, you must be able to adequately perform the following:

- Processes a large volume of both private and Federal Direct PLUS loans using the following softwares: SIS, ScholarNet, COD, and other loan services websites.
- Actively listening to and responding to customer and/or other staff(s) needs while having a courteous and helpful attitude.

- Educate students, parents, other staff(s) on specific loans, loan lenders, application processes (i.e. FAFSA, private loan application, and/or Federal Direct PLUS loan application), interest rates and fees.
- Understand and comply with appropriate Federal and State laws, loan lenders' policies, and the Department of Education's guidelines, regulations, and procedures.
- Run and review queries to ensure loans are ready to be processed and fix errors that may need attention.
- Manages and scan all document types into software, attach document to students' account, and ensures that all documents have been reviewed for processing.
- Analyze the collected data to project trends and patterns to predict how our work will be impacted and to be proactive before problem arises.
- Generate and prepare reports to team to fix any data-related and/or assist in preparing for loan application processing.
- Lead in delegating projects and/or tasks based on the work load, individual strengths and skill sets, and experience levels.
- Manage all the training manuals, schedules, and delegate training tasks amongst team members.
- Overseas the hiring employment process: updating hiring documents, post and manage the job posting, engage in the interview process, and finalizing candidates for hiring.
- Supports team members in particular when supervisor is out of the office.
- Develops strategies to promote team goals and mission-related objectives to meet deadlines.
- Assist in conducting team meetings to update team members on best practices and continuing expectations.
- Handles escalated customer service which includes: phone calls, email inquiries, face-to-face interactions, and complaints.
- Creates and leads financial aid and/or loan specific presentations and training for other units and other departments.
- Mentor team members and meet with them individually to discuss performance, offer feedback, and expected work ethic.

Knowledge, Skills, & Abilities:
- Provide excellent customer service (phone, face-to-face, and/or email) to anyone who connects with our unit/ department
- Excel in Student Information System (SIS)/ Peoplesoft
- Ability to work both as a team member and individually
- Problem-solving and critical thinking skills
- Assist with training new hires, updating training documents, and presenting training documents
- Assists in hiring new student employees (reviewing applications, setting up interviews, assist with final candidate(s) decisions)
- Ability to create and provide data reports

Anticipated Schedule:
- Office schedule will be agreed upon with employees after hire
- There may be occasional responsibilities outside of regular business hours
- Student Employment regular office hours are 8am-4:30pm Monday-Friday

Anticipated Hours:
- Hours/week: 10-12 hours minimum for the Academic Year
- Summer Hours: varies

Compensation: $13.50

Supervisor: Erica Tisdale, Federal Awards Coordinator