

Southwest Tech is committed to providing a welcoming environment and a sense of community where all employees can experience success. We empower and inspire all members of the Southwest Tech community to embrace differences, defend human dignity, and respect the richness of values and ideas that each person brings to the college.

POSITION	Financial Aid Assistant/Accounting Bursar [Full Time, Benefited]
APPLY BY	April 25, 2025
HIRE DATE	To Be Determined
DIVISION	Financial Aid
REPORTS TO	Student Financial Assistance Manager
CLASSIFICATION	Hourly (Non-Exempt)
POSTING DATE	April 4, 2025

SUMMARY

This position plays a vital role in student success by fostering meaningful financial conversations and providing personalized support in financial aid and helping students develop a plan for paying for college and life while a college student. Through one-on-one interactions, this position helps students and families navigate FAFSA completion, loan counseling, financial aid verification, veteran education benefits, and third-party funding sources while ensuring compliance with federal, state, and institutional policies. A key focus of this role is developing and implementing student success plans that integrate financial wellness strategies, including budgeting, debt management, and long-term financial planning. By engaging in proactive outreach and collaborating with student success teams, admissions, and district high school, this position empowers students to make informed financial decisions, enhancing their ability to persist and succeed in their academic and career goals.

ESSENTIAL DUTIES AND RESPONSIBILITIES INCLUDE

- **Provides Personalized Financial Success Planning** – Conducts individualized financial success coaching sessions with students to assess their financial situations, identify challenges, and develop tailored financial plans that align with their academic, personal, and career goals. Guides students on budgeting, debt management, and financial literacy to promote long-term financial well-being.
- **Creates a Supportive & Inclusive Student Environment** – Fosters an inclusive, welcoming atmosphere that encourages student success and engagement. Builds strong professional relationships with students, providing mentorship and guidance to help them navigate financial challenges with confidence.
- **Collaborates with Student Success Networks** – Partners with Student Success Networks to provide holistic guidance on financial literacy, academic planning, and resource accessibility. Supports assigned program students and their families throughout the enrollment cycle, ensuring financial aid processes are clear and accessible from entry through graduation.
- **Oversees Student Financial Case Management** – Maintains individualized student financial aid case management loads, providing ongoing coaching, counseling, and advising on all aspects of college financial aid and funding resources. Assesses student eligibility, approves the disbursement of funds, and ensures students receive the financial support necessary to achieve their academic goals.
- **Provides Comprehensive Financial Aid & Billing Support** – Delivers exceptional customer service by guiding students, parents, staff, and faculty through all stages of the financial aid and billing process. This includes assisting with FAFSA completion, entrance and exit loan counseling, aid program eligibility, application procedures, and required documentation. Educates students on payment options, accepting financial aid awards, using funds for textbooks, and managing their overall financial responsibilities. Additionally, reviews Satisfactory Academic Progress (SAP) appeals and other financial aid exceptions to ensure compliance with federal and institutional policies while advocating for student success.
- **Manages Student Payments & Financial Transactions** – Maintains, tracks, and updates student payments with accuracy and efficiency. Responsibilities include reconciling student payments across multiple payment methods (cash, checks, credit cards), ensuring electronic credits align with deposit records, processing student billing

statements, scheduling and managing student refunds and stipends, and overseeing student club deposits and payable transactions. Additionally, compiles financial statements to support institutional financial reporting.

- **Ensures Compliance & Accuracy in Financial Aid Processing** – Reviews and verifies financial aid files to confirm accuracy and adherence to federal, state, and institutional regulations. Ensures students and parents provide correct documentation, following established policies and procedures to facilitate timely aid disbursements.
- Proactively follows up with applicants at various stages of the financial aid process to ensure seamless completion.
- **Optimizes Cash Flow & Student Account Management** – Works proactively to accelerate and maximize cash flow of student receivables in alignment with the Southwest Tech Credit Agreement. Maintains and updates accounts receivable ledgers in coordination with external agencies, including the Wisconsin Department of Revenue Tax Refund Intercept Program (TRIP) and State Debt Collection (SDC) agency.
- **Administers Federal & State Student Assistance Programs** – Oversees and coordinates the administration of Federal and State Veterans Affairs education benefits, and Federal Work-Study. Responsibilities include verifying student eligibility, certifying credits for benefits, tracking veteran education funding, and reviewing student budgets. Maintain a broad knowledge of VA education benefits-Post 9/11 GI Bill (33), Montgomery GI Bill (30), Vocational Rehabilitation Benefits (31), DEA (35), Reservist GI Bill (1606) for the purpose of certifying veterans for educational benefits.
- **Engages in Community & Outreach Initiatives** – Visits outreach sites and regional K-12 schools to provide financial aid education and develop personalized student financial plans. Supports college admissions, registration, and recruiting efforts by ensuring prospective students and families understand their financial aid options and pathways to college affordability. · **Emergency Grant & Student Financial Wellness Programs** – Reviews and processes applications for the Charger Dream emergency grant fund, ensuring students experiencing financial hardship receive appropriate assistance. Provides responsive support to student concerns, working diligently to resolve financial issues and promote overall financial wellness.
- Other tasks and projects as assigned.

TRAINING AND EXPERIENCE

- **Education & Experience** – Associate’s degree in accounting, business, or a related field, with a minimum of three years of relevant experience; or an equivalent combination of education and experience sufficient to successfully perform the essential duties of the position. Prior experience in financial aid, student accounts, or a higher education setting is preferred.
- **Strong Organizational & Multitasking Abilities** – Highly organized and detail-oriented, with the ability to manage multiple projects simultaneously, track critical deadlines, and ensure accuracy in financial transactions. Demonstrated ability to work independently while also contributing effectively within a team environment.
- **Technology Proficiency** – Skilled in the use of Microsoft Office Suite, student information systems (SIS/ERP), and other financial management tools. Comfortable navigating digital platforms and adapting to new technology to improve efficiency and service delivery.
- **Exceptional Interpersonal & Communication Skills** – Strong verbal and written communication skills, with the ability to explain complex financial concepts in a clear and accessible manner. Able to interact professionally with students, parents, faculty, and staff from diverse cultural, social, and educational backgrounds.
- **Customer Service Excellence** – Committed to providing a high level of customer service by actively listening, responding to inquiries with accuracy and empathy, and guiding students and families through financial aid and billing processes. Ability to problem-solve, address concerns proactively, and create a welcoming and supportive environment for all stakeholders.

KNOWLEDGE

- **Financial & Accounting Management:** Proficient in general accounting principles (GAAP), accounts management, tax forms (1040), financial reconciliation, and institutional cash flow management.
- **Customer Service & Student Engagement:** Strong ability to provide compassionate, solution-focused customer service, assisting students and families with financial aid, billing concerns, and payment options. Proficient in crisis management and intervention techniques to support students in financial, academic, or personal distress.
- **Office Practices & Administrative Management:** Strong organizational skills with experience in office procedures, recordkeeping, contract management, and financial reporting. Manage multiple projects, track deadlines, and prioritize tasks effectively in a fast-paced environment.
- **Communication & Professionalism:** Exceptional communication and relationship-building skills with the ability to engage, support, and build relationships with students, parents, faculty, and colleagues while maintaining professionalism and accountability.
- **Empathy & Analytical Thinking:** Balances analytical problem-solving with empathy, offering students both financial guidance and emotional support.

SKILLS

- **Student Billing & Payment Systems:** Knowledgeable in student account management, billing cycles, payment plans, tuition reimbursement, and third-party payment processing. Skilled in maintaining accurate financial records and student files using financial management tools and Student Information Systems (SIS) or ERP software.
- **Financial Aid & Regulatory Compliance Expertise:** In-depth knowledge of financial aid programs, federal and state regulations, and compliance with Title IV, FERPA, and Veterans Affairs benefits. Proficient in interpreting and applying financial aid policies and regulations while maintaining institutional and governmental compliance.
- **Technology Proficiency & Data Management:** Adept at using SIS/ERP systems and data management tools to enhance operational efficiency and accuracy.

PHYSICAL REQUIREMENTS STATEMENT

- Southwest Tech is committed to creating an inclusive and accessible workplace. While certain job roles may require physical capabilities, we welcome applicants of all abilities and are committed to providing reasonable accommodations throughout the hiring process and in the workplace.

APPLICATIONS

Internal and External applicants complete and submit the online employment application at www.swtc.edu/jobs

For questions regarding the application process, or if you need an accommodation, please email Human Resources at humanresources@swtc.edu or **608.822.2314**. (TDD: 608.822.2072)

SALARY RANGES

B22 Hourly: \$18.26-\$23.74

BENEFITS/SERVICES

Our comprehensive benefit package includes the following and much more:

- Health Insurance
- Dental Insurance
- Vision Insurance
- Life Insurance
- Long-Term Disability
- Health Savings Account
- Health Club Access
- Wisconsin Retirement System Contribution
- On-campus day care (hourly rate charged)
- College Savings Program
- Additional Voluntary Benefits
- Paid Time Off

SELECTION PROCESS

The Review Committee will screen applicants and contact them for an interview. Meeting the minimum qualifications does not assure the candidate an interview. Final candidate's employment offer may be subject to completion of a criminal background check and pre-employment drug screening.

Southwest Tech does not discriminate on the basis of race, color, national origin, sex, disability, or age in its programs and activities. The Equal Opportunity/Affirmative Action Officer has been designated to handle inquiries regarding non-discrimination policies. Call 800-362-3322, Ext. 2315 (TDD: 608-822-2072) or write Southwest Tech, 1800 Bronson Blvd., Fennimore, WI 53809.