FINANCIAL AID ADVISOR

DEFINITION

Under general supervision, provides outreach for the College's financial aid program; handles and resolves the more difficult financial aid problems; acts as the Director of Financial Aid on a relief basis; performs related work as assigned.

CLASS CHARACTERISTICS

This single position class has extensive contact with students and others to interpret and explain regulations, obtain information and resolve the most difficult problems related to the receipt of financial aid. Responsibilities also include outreach to potential College students, utilization of the computerized financial aid data base, and provision of technical support and instruction to financial aid staff.

EXAMPLES OF DUTIES (Illustrative Only)

- Conducts workshops for potential students and their parents and school counselors to explain policies and procedures (E)
- Meets with students on a one-on-one basis to provide such information (E)
- Develops an orientation schedule and coordinates arrangements with various school (E)
- Prepares, edits and updates brochures and other information related to financial aid programs (E)
- Provides for the distribution of such literature to appropriate sources (E)
- Resolves difficult student financial aid problems by meeting with students and others as appropriate, obtaining additional information and exploring alternative sources of aid (E)
- Provides instruction and technical direction to office staff (E)
- Reviews, analyzes and processes student applications for various types of financial aid and/or similar benefits in accordance with state, federal and College guidelines (E)
- Explains the benefits and requirements of various programs to students (E)
- May provide bilingual services to the monolingual and limited English-speaking program participants and their parents (E)
- Assists students in completing applications and other materials (E)
- Certifies students' eligibility for particular programs (E)
- Enters student information into the computer processing system (E)
- Monitors ongoing status of students receiving aid (E)
- Prepares correspondence, reports and other written materials (E)
- Attends informational workshops, conferences and meetings to gather and disseminate information (E)
- Maintains accurate records and files (E)
- Acts as the Director of Financial Aid on a relief basis
- Performs related duties as required or assigned

(E) = designates essential functions

QUALIFICATIONS

Knowledge of:

- Techniques for dealing with individuals from diverse academic, ethnic, socioeconomic and cultural background
Knowledge of: (Cont’d)

- Federal and state laws and College rules and regulations relating to financial aid for students
- Business data processing principles and the data base model used for financial aid applications
- Record keeping principles and procedures
- Standard office practices and procedures
- Business mathematics
- Correct English usage, including spelling, grammar and punctuation
- Basic supervisory principles and practices

Skill in:

- Resolving financial aid problems in a creative manner
- Interpreting, explaining and applying complex rules and procedures
- Analyzing and evaluating alternatives, recommending solutions, and assisting students to obtain the full awards available
- Organizing and prioritizing work
- Instructing others in work procedures
- Interviewing students and obtaining required information
- Preparing clear and concise informational materials and correspondence
- Using initiative and sound judgment within established procedural guidelines
- Maintaining accurate records and files
- Maintaining confidentiality of information
- Making accurate mathematic calculations
- Establishing and maintaining effective working relationships with those contacted in the course of the work
- Typing with sufficient speed and accuracy to enter data into a computer data base

Other Requirements

- Must possess a valid California driver's license or be otherwise able to get to meetings away from the worksite
- Must be willing to attend off-hours and off-campus meetings
- Specified positions may require or desire bilingual skill in a designated second language

A typical way of gaining the knowledge and skills outlined above is:

Equivalent to completion of two years of college with major coursework in a field related to the work and three years of increasingly responsible experience involving public contact in financial assistance services, or other responsible work experience related to the assignment. Experience in reviewing and processing student financial aid applications is desirable. Additional experience as outlined above may be substituted for the education on a year-for-year basis and possession of a four-year degree may reduce the work experience requirement to one year.

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