



West Valley - Mission

Community College District

CLASS SPECIFICATION

ENROLLMENT AND FINANCIAL SERVICES ADVISOR

Classified Position (Non-Exempt Status)

Classified Office, Technician & Business Services Salary Schedule – Range 57

DEFINITION

To perform a variety of specialized technical duties related to admissions and records, and financial aid programs; to provide information to students, faculty, and staff regarding the evaluation and status of academic records and financial services; and to perform a variety of student support services including enrollment processing, degree audit, and processing of financial awards, student loans, and scholarships.

DISTINGUISHING CHARACTERISTICS

This is the journey level in the single level Enrollment and Financial Services technical class. Employees at this level receive only occasional instruction or assistance as new, unusual or unique situations arise and are fully aware of the operating procedures and policies within the work unit.

This class is distinguished from the Senior Enrollment and Financial Services Advisor in that the latter is responsible for student outreach and recruitment activities in addition to the more complex technical duties of the department.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from the Director, Enrollment and Financial Services.

EXAMPLES OF ESSENTIAL DUTIES - Duties may include, but are not limited to, the following:

Advise, assist, and provide a variety of technical duties related to admissions, records, athletics, veterans, and financial aid; review application packets and assist students with completion as necessary.

Serve as the initial source of information and assistance to the public; provide information regarding college schedules, catalogs, policies and procedures, registration and admission processes, matriculation,

graduation requirements, transcript requests, financial aid, and veterans or other college programs and services.

Receive, review, evaluate, and correct errors on a variety of forms, applications, reports and records related to student enrollment, eligibility, and financial services programs.

Compile, record, input, post, update, verify, monitor and retrieve student data, including grades; assist in the preparation of federal, state, and district reports regarding student academic progress and status.

Review and document student eligibility for admission, degrees, certificates, transfer, and financial assistance or awards.

Collect payment for student fees, tuition, and other charges; document, balance and maintain funds according to established and accepted procedures; perform daily reconciliations as needed.

May receive billing approval for student veterans and other student billing and prepare invoices.

Establish and maintain student files using a variety of technology systems and software; troubleshoot errors in applicable software and database programs; advise students of status, changes, errors or omissions.

Generate, verify and monitor computer reports to ensure accuracy and compliance with established requirements; reconcile financial and statistical data.

Update and maintain a variety of manual and electronic forms and information, including posting information to district and/or college websites.

Confer with and provide information to counselors, administrators and faculty regarding a variety of student information and records.

Make presentations to large and small student groups regarding processes, requirements and procedures of area of assignment; assist with outreach events and functions.

Train and assign work to student workers; track and process student worker timesheets.

Receive, open, sort, and distribute incoming mail and related forms; process requests for transcripts to and from other colleges and universities.

Provide assistance and information regarding department policies and procedures, and evaluation and processing of student records; answer questions and resolve issues related to student academic concerns.

Build and maintain positive working relationships with co-workers, other district employees, and the public using principles of good customer service.

Foster an environment that embraces diversity, integrity, trust, and respect.

Be an integral team player, which involves flexibility, cooperation, and communication.

Perform related duties as assigned.

MINIMUM QUALIFICATIONS

Knowledge of:

Procedures, methods, and references used in the evaluation of student records.

Principles and practices of basic math and statistical data reporting; record keeping techniques.

Modern office practices, procedures, and equipment, including applicable software programs and database management systems.

Pertinent federal, state, and district laws, rules, regulations, policies and procedures.

Depending on initial area of assignment, knowledge of either college course equivalencies, descriptions and numbering systems; and general education, major, degree, and transfer requirements; OR, student eligibility requirements for a variety of state and federal aid programs, and methods and practices of needs assessment and award packaging.

Policies and procedures of district admissions and records process.

Student eligibility requirements for a variety of state and federal aid programs; methods and practices of financial aid needs assessment and award packaging.

General education, major, degree, and transfer requirements; course equivalencies, descriptions and numbering systems.

Database and software programs specific to the district enrollment process.

Specific federal and state laws, codes, and ordinances pertaining to area of assignment.

Ability to:

Evaluate student records and transcripts; determine eligibility requirements for transfer credit, graduation, athletic or veterans programs, and financial aid programs.

Effectively present information regarding enrollment and financial services programs to students, faculty, staff, and the public.

Intermittently, review and evaluate documents related to department operations; observe, identify and problem solve office operations and procedures; understand, interpret and explain department policies and procedures; explain operations and problem solve issues for the public and with staff.

On a continuous basis, sit at desk for long periods of time or stand at public counter; intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone; write or use a keyboard to communicate through written means; and lift or carry weight of 10 pounds or less.

Make arithmetical calculations with speed and accuracy.

Use sound judgment in recognizing scope of authority.

Operate and use modern office equipment including computers and applicable software.

Maintain regular attendance and adhere to prescribed work schedule to conduct job responsibilities.

Utilize appropriate safety procedures and practices for assigned duties.

Communicate effectively orally and in writing.

Relate effectively with people of varied academic, cultural, and socio-economic backgrounds using tact, diplomacy, and courtesy.

Establish and maintain effective, cooperative, and collaborative working relationships with others.

Experience and Education

Any combination of experience and education that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Two years of responsible experience involving student academic records or financial aid.

Education:

Equivalent to an Associate's degree from an accredited college with major coursework in a business, general education, or a related field.

EEO Category: Clerical/Secretarial

Date Approved: July 1, 2017