



West Valley - Mission

Community College District

CLASS SPECIFICATION

FINANCIAL AID ADVISOR

Classified Position (Non-Exempt Status)

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

DEFINITION

To perform a variety of technical functions related to financial aid, institutional scholarships, and related programs; to evaluate and prepare comprehensive financial aid packages; and to maintain and coordinate updates to relevant computer software systems.

DISTINGUISHING CHARACTERISTICS

This is the journey level in the single level Financial Aid Advisor class. Incumbents initially perform the more routine duties assigned to positions in this class and work under close supervision. However, as experience is gained, incumbents are expected to perform the full range of duties as assigned with increasing independence.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from the Supervisor, Financial Aid Services.

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

Inform and advise students and their families regarding eligibility and requirements for financial aid programs and scholarships; assist students with completion of required application and documentation; review and evaluate student financial aid files; disburse funds as appropriate.

Analyze and evaluate the financial need of students using federal and state guidelines; review special circumstances requests and render decisions based on established criteria; participate in financial aid appeals.

Provide technical expertise regarding student financial aid and scholarships to students, staff, faculty, and administrators.

Verify eligibility requirements for financial aid and scholarship programs are met; perform monthly disbursement reconciliation; render professional judgment regarding financial aid eligibility adjustments.

Utilize complex computer programs in the review, processing, recording and verification of statistical data; generate, verify and analyze computer reports to ensure accuracy with established requirements; reconcile financial and statistical data.

Monitor and troubleshoot problems and issues related to the efficiency of automated financial aid and scholarship system software modules and related databases; serve as key technical advisor and coordinate solutions and recommendations with information systems staff.

Liaison with office of instruction staff to ensure communication of newly approved programs and certificates through the State Chancellor's office; ensure timely creation in the student system and program eligibility identification.

Develop, maintain, and disseminate calendar of events and deadlines pertinent to financial aid and scholarships; perform periodic reconciliation of assigned financial aid and scholarship programs.

Assure compliance with federal and state regulations and mandates related to record retention and destruction, and audit compliance.

Apply financial aid expertise when assigned to specialized related programs; act as liaison with other departments and outside agencies in the processing, tracking and monitoring of program requirements and documentation.

Attend and participate in professional development and training activities.

Assist and support outreach staff at various functions and events as needed.

Prepare and maintain accurate and timely reports; perform monthly and annual reconciliation of assigned programs.

Hire, train, and assign work to student workers; process and review work study student timesheets; may function as work study coordinator as required.

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:

Eligibility requirements of a variety of state and federal financial aid programs.

Public benefits and entitlement programs.

Pertinent federal, state, and district laws, rules and regulations, including Title IV program fund regulations.

Methodology of financial aid needs analysis and packaging.

Applicable financial aid databases.

Ability to:

Read and interpret financial statements, income tax reports and related documents, and advise students regarding financial aid application procedures, eligibility and requirements.

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.

Determine eligibility for a variety of federal, state, and district grants, services, loans, and other financial assistance.

Research regulatory information and resolve complex financial questions.

Utilize modern office equipment, including computers and relevant software programs.

Perform arithmetic calculations and reconcile financial data.

Perform needs analysis and package financial awards according to program eligibility requirements.

Review and assess student academic progress to ensure compliance with program requirements.

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 financial aid experience.

Education:

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

EEO Category: Clerical/Secretarial

Date Approved: July 1, 2017