GENERAL PURPOSE
Under direction, performs specialized and complex duties in support of District financial aid programs and services; receives, analyzes, evaluates and validates student financial aid applications; performs financial needs analyses, determines eligibility for a variety of work study, loan, grant and scholarship programs and packages financial aid awards in accordance with District policies and federal, state and local requirements; interviews and counsels students on financial aid opportunities and programs; and performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS
Financial Aid Advisor is responsible for performing complex and responsible financial aid duties and tasks, including verifying accuracy of student financial aid applications, analyzing and reviewing applications to determine financial need and eligibility, counseling and advising students on academic goals and financial aid program eligibility and preparing financial aid packages. An incumbent serves as a technical resource to District and department staff, and provides information and guidance on financial aid programs, policies and requirements. An incumbent is expected to independently perform job assignments using detailed knowledge of sound practices and District policies and procedures and federal, state and local requirements learned through experience.

Financial Aid Advisor is distinguished from Financial Aid Specialist in that an incumbent in the former class is responsible for performing the more complex and responsible duties for the District’s financial aid program, requiring a greater knowledge of District policies and federal, state and local requirements pertaining to student financial aid programs.

ESSENTIAL DUTIES AND RESPONSIBILITIES
The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this class.

1. Provides technical assistance and information to students, parents and staff regarding financial aid programs and services; instructs students in proper completion of forms and applications; explains applications, requirements and restrictions; processes applications and verification forms and reviews completed forms for accuracy and completeness; conducts confidential interviews with potential and current students to validate information submitted and clarify discrepancies; completes pending files for awarding of federal and state financial assistance.

2. Performs needs analyses to determine financial need and program and packages financial aid awards
in compliance with all federal, state and local regulations and District policies; determines eligibility of students for Pell Grant, EOPS, Perkins Loan programs, Federal Work Study, Stafford Student Loan programs, Cal Grants and other financial aid programs; ensures compliance with program requirements; serves on the Financial Aid Appeal committee and reviews student appeals for additional loan amounts and reinstatement of financial aid.

3. Administer the National Service Trust program; verifies enrollment; processes vouchers and notifies students when payment has been received; conducts annual orientations for work study students.

4. Conducts entrance and exit meetings for William D. Ford Direct Loan and Perkins Loan programs; maintains and updates entrance and exit packets for distribution to students.

5. Organizes, coordinates and conducts financial aid workshops for community events and local high schools; organizes financial aid outreach activities on and off campus; maintains, orders, updates and disseminates recruitment materials for presentations and recruitment events.

6. Maintains current knowledge of federal and state laws, local and District regulations, policies and guidelines which affect financial aid programs, application processing and eligibility requirements.

7. Compiles and prepares statistical and financial records and reports; prepares and types letters and other correspondence; maintains student records and files; enters, updates and revises computer records and information.

OTHER DUTIES

1. Provides backup support for Financial Aid Specialists and handles escalated issues and questions on financial aid programs and policies.

2. Attends meetings, workshops, conferences and other training sessions as assigned.

QUALIFICATIONS

Knowledge of:

1. Federal, state and local financial aid programs and regulations.

2. Applicable sections of State Education Code and other applicable laws.

3. Policies, objectives and technical aspects of financial aid programs and activities.

4. Methods and techniques of conducting financial aid needs analyses.

5. Methods and procedures of financial aid award packaging.

6. District organization, operations, policies and objectives pertaining to student admissions and financial aid.

7. Financial and statistical recordkeeping techniques.

8. Principles and techniques of student interviewing and counseling.
9. Administrative practices and procedures, including record keeping and filing practices and procedures.

10. Modern office methods, practices and equipment.

11. Operation of standard business software and equipment.

12. Basic math.


**Ability to:**

1. Interpret rules, regulations and policies regarding financial aid programs and awards and determine student eligibility.

2. Develop financial aid packages to meet financial needs.

3. Perform financial and statistical recordkeeping duties for a variety of federal and state financial aid programs.

4. Relate effectively to students with economically deprived backgrounds.

5. Analyze situations accurately and adopt an effective course of action.

6. Organize, set priorities and exercise sound independent judgment within areas of assigned responsibility.

7. Interpret, apply, explain and reach sound decisions in accordance with District policies and federal, state and local regulations and requirements.

8. Communicate clearly and effectively, both orally and in writing.

9. Prepare clear, concise and accurate reports, correspondence and other written materials.

10. Operate a computer using word processing and other business software and other standard office equipment.

11. Organize and maintain specialized files.

12. Maintain confidentiality of District files and records.

13. Exercise tact and diplomacy in dealing with sensitive, complex and confidential personnel issues and employee situations.

14. Establish and maintain effective working relationships with District management, staff, students, parents and others encountered in the course of work.

**Education, Training and Experience:**

A typical way of obtaining the knowledge, skills and abilities outlined above is graduation from high school or G.E.D. equivalents; completion of two years of college-level coursework in business, accounting, social services or a related field; and three years of progressively responsible student
financial aid experience, including training in needs analyses, financial aid packaging and student advisement; or an equivalent combination of training and experience.

**Licenses; Certificates; Special Requirements:**
A valid California driver’s license and the ability to maintain insurability under the District’s vehicle insurance policy.

**PHYSICAL AND MENTAL DEMANDS**
The physical and mental demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**Physical Demands**
While performing the duties of this job, the employee is regularly required to sit; talk or hear, both in person and by telephone; use hands to finger, handle and feel computers and standard business equipment; and reach with hands and arms. The employee is frequently required to stand and walk.

Specific vision abilities required by this job include close vision and the ability to adjust focus.

**Mental Demands**
While performing the duties of this class, the incumbent is regularly required to use written and oral communication skills; read and interpret complex data, information and documents; analyze and solve complex problems; use math/mathematical reasoning; perform highly detailed work under changing, intensive deadlines, on multiple concurrent tasks; work with constant interruptions, and interact with District management, staff, students, parents and others encountered in the course of work.

**WORK ENVIRONMENT**
The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The employee works under typical office conditions, and the noise level is usually quiet.