

Citrus College

Position Description

Position: Financial Aid Advisor	Position Number:
Department/Site:	FLSA: Non-exempt
Reports to:	Salary Grade: 34

Summary

Advises and assists students regarding all aspects of financial aid programs, forms, regulations, and procedures. Assists in the calculation of federal need analysis and awarding of financial aid. Responsible for reporting financial aid awards and budgets to appropriate agencies. May also be responsible for maintaining financial aid archives. Works independently under minimal supervision.

Distinguishing Career Features

The Financial Aid Advisor is the third level in a three-step career ladder for financial aid transaction processing. To qualify for this level, prospective incumbents must demonstrate in-depth knowledge of financial aid programs to determine student eligibility and the ability to package and determine loan amounts. At this level, incumbents must also demonstrate advanced knowledge of the operating characteristics and features of federal, state, and internal computer programs used for financial aid and student information.

Essential Duties and Responsibilities

- Guides and advises students and prospective students concerning the financial aid programs. Explains complex policies and procedures.
- Reviews and evaluates financial aid applications to determine accuracy, completeness and financial need level. Uses Federal Methodology need-analysis criteria for review. Performs any required follow-up procedures to get additional information, correct errors or elicit more in-depth data from applicants.
- Verifies application data for accuracy. Compares FAFSA data with verification documents (1040s, Worksheets, W-2s etc.). Corrects information on a financial or student database, performs need analysis, and prepares computer files for reprocessing.
- Packages and determines award levels within established guidelines. Communicates award levels with students, sets up accounts along with disbursement and payment dates, and receives and allocates award funds from grantors.
- Grants financial aid awards. Determines need levels, confirms resources, and awards funds within pre-existing parameters. Uses automated data entry/access programs to secure funds from available resources, or manually inputs awards on an individual student-by-student basis.
- Provides one-on-one advising for students, parents, or others regarding financial aid issues, procedures to award, reasons for denial or lack of eligibility, deadlines, petition processes and other relevant issues.

- May provide partial leadership over certain aspects of the day-to-day office routine by organizing and prioritizing workload, reviewing applications and awards for accuracy and compliance, and reviewing financial aid budget projections.
- Assists applicants in completing the various forms required for financial aid. Resolves problems with applications and/or financial aid checks.
- Reviews student satisfactory academic progress. Requests and reviews transcripts and other materials to support packaging of financial aid and/or collection of amounts owed.
- Administers or serves as primary resource for one or more programs, such as, but not limited to, special grant, study abroad, and state or local arrangement.
- Troubleshoots and resolves problems associated with financial aid application status, award levels, student information, communications among separate computer systems, and data integrity. Updates data, rate, and award tables.
- Maintains ongoing paper and computer-aided records and databases. Ensures privacy of confidential financial aid records and archives.
- Extracts and imports information from financial aid databases to support reporting and auditing. Updates tables in databases to reflect current rates and schedules.
- Troubleshoots problems accessing, storing, manipulating, remitting, and extracting data to and from financial aid and student databases.
- Performs other duties as assigned that support the overall objective of the position.

Qualifications

▪ **Knowledge and Skills**

Requires considerable knowledge of financial aid policies, procedures and operations. Requires knowledge of Federal and State regulations, policies and procedures relating to awarding and administering Financial Aid. Requires a working knowledge of admissions, transcripts, and satisfactory academic progress. Requires knowledge and skill with networked financial aid computer software and systems as well as student information systems. Requires well-developed skills with and knowledge of applicable word processing, spreadsheet, and student database applications sufficient to extract and import data, perform queries, and tabulate reports. Requires well-developed math skills sufficient to compute sums, portions, percents, ratios, and quotients from formulas and tables. Requires well-developed human relations skills to convey technical concepts to others, resolve difficult and sensitive confrontations, facilitate small group in-service, and project a positive image of the College.

▪ **Abilities**

Requires the ability to independently perform all of the duties of the position with efficiency and effectiveness. Requires the ability to analyze technical and complex information and documents and make assessments according to well-established policies, procedures, and mandated regulations. Requires the ability to impart technical and detailed information through one-on-one or group presentations. Requires the ability to perform data entry and database management duties and other general record-keeping and file maintenance duties. Requires the ability to communicate both formally

and informally with a wide range of contacts both inside and outside the College setting. Requires the ability to perform assignments on varying work schedules.

- **Physical Abilities**

Incumbent performs work of predominately a sedentary nature. Requires ambulatory ability to sit in front of a computer screen for extended periods of time, to move about between workstation and customer service counters, and to reach for work materials and files. Requires sufficient hand, arm, and finger dexterity to operate computer keyboard, typewriter or other office equipment. Requires visual acuity to read words and numbers. Requires speaking and hearing ability sufficient to hear over the phone and carry on routine conversations.

- **Education and Experience**

This position requires a minimum of two years of financial aid experience in a college or university setting. An Associate's Degree is preferred for this position.

- **Licenses and Certificates**

May require a valid driver's license.

- **Working Conditions**

Work is performed indoors where minimal safety considerations exist.