



## **JOB TITLE: FINANCIAL AID ADVISOR**

Classification: Classified  
Salary Range: 35

Retirement Type: PERS\*  
Revised/Board Approved: May 27, 2025

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### **BASIC FUNCTION:**

Under the direction of an assigned supervisor, oversees the primary functions of the day-to-day delivery of Financial Aid Funds; performs complex student services, technical duties; leads, trains, coordinates, and provides work direction to subordinate personnel; serves as the institutional liaison in the absence of the supervisor and or director. The Financial Aid Advisor assists in the preparation, maintenance and review of financial aid functions and operations; oversees the day-to-day compliance and delivery of Federal State and Institutional aid; performs complex analysis of transactions and reports; provides technical expertise related to Title IV and State Funding.

### **REPRESENTATIVE DUTIES:**

Assure compliance with Title IV Federal regulations in addition to State regulations in regards to delivery of funds to students.

Compose and analyze reports for financial aid; maintain records, ledgers and reports. Assess the accuracy and completeness of reports and computer reports.

Detect, trace and adopt an effective course of action to correct errors and discrepancies within compliance of federal and state regulations.

Perform a qualitative and quantitative analysis of a variety of documents up to and including, but not limited to: Federal tax returns, official academic transcripts, INS documents, Selective Service correspondence, Social Security documents, court orders, medical transcripts, official birth certificates and promissory notes.

Research necessary federal regulations for the distribution of information to inquiring persons and/or to assure compliance on behalf of the district on a day to day basis.

Lead, train, and provide work direction to financial aid support personnel; monitor and coordinate workflow; assure the timely completion of duties assigned to the unit.

Reconcile reports for various programs, (i.e., Cal Grant Program, Federal Workstudy Program, Federal Family Education Loan Program, and others as needs dictate).

Advise students on the following procedures including but not limited to: Satisfactory Academic Progress appeal procedure, Dependency Override procedure and Projected Year Income Appeal procedure.

Analyze student data and certify eligibility for program participation as required; interpret, apply and explain complex rules, regulations, requirements and restrictions.

Maintain current knowledge of variety of complex regulations requirements and policies related to assigned specialty areas.

Research and interface with Social Service agencies for support services for students that need: nourishment, housing, counseling, medical attention, child care services, legal advice, law enforcement assistance, substance abuse assistance and assistance to become self sufficient and productive members of society.

Participate in task force meetings and the selection of new staff members.

Coordinate the reconciliation of program funds with other District offices such Accounting and Information Systems.

Coordinate related job duties with other District departments such as Admissions and Records, Counseling, Care/Gain, EOP&S, Job Placement and Special Resource Center.

Perform a variety of specialized, technical, and analytical processes involving independent judgment which have fiscal implications for the District.

Design and implement expanded promotional and application materials, and informational packets regarding program requirements and available support services.

Perform related duties as assigned.

### **JOB QUALIFICATIONS:**

#### Education and Experience:

Any combination equivalent to: two years of college course work in a related field and three years of increasingly responsible experience in a related area.

### **OTHER QUALIFICATIONS:**

#### Knowledge/Areas of Expertise:

Specialized functions, operation and activities in an assigned student advisement area.

Interviewing techniques.

District services and community resources available to students.

Oral and written communication skills.

Interpersonal skills using tact, patience and courtesy.

Applicable sections of State Education Code and other applicable laws.

District organization, operations, policies and objectives.

Technical aspects of field of specialty.

Financial and statistical record-keeping techniques.

Correct English usage, grammar, spelling, punctuation and vocabulary.

Modern office practices, procedures, personal computer and equipment.

#### Abilities/Skills:

Provide specialized paraprofessional duties and advisement to students in a specialty field.

Assess student needs and interests and develop viable plans and alternatives.

Interview students to determine program eligibility and obtain relevant data.

Plan, develop and conduct informational workshops.

Read, interpret, apply and explain rules, regulations, policies and procedures.

Work independently with little direction.

Establish and maintain cooperative and effective working relationships with others.

Train and provide work direction to others.

Analyze situations accurately and adopt an effective course of action.

Work confidentially with discretion.

Maintain records and prepare reports.

**WORKING CONDITIONS:**

Typical office setting.

Some travel may be required.

Hand and finger dexterity to operate various office equipment.

Days and hours may vary.

Additional hours may be required.

Long periods of standing and sitting.

Move from one work area to another as needed.

Lift and carry 25 lbs.

\* Previous employment performed in a different public retirement system may allow eligibility to continue in the same retirement system.