

Palomar Community College District

FINANCIAL ASSISTANCE ADVISOR

Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are not intended to reflect all the duties performed within the job.

DEFINITION

To advise, review and evaluate to determine eligibility for Federal, State and institutional financial assistance and scholarship programs including Veterans Administration (VA) Educational Benefits; to provide information to faculty, staff, parents and students about financial assistance/educational benefits policies, procedures and programs; to fulfill Federal and State processing and reporting requirements; to perform a variety of technical tasks relative to assigned area of responsibility.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from the Director of Financial Aid and Scholarships.

ESSENTIAL AND MARGINAL FUNCTION STATEMENTS

Essential and other important responsibilities and duties may include, but are not limited to, the following:

Essential Functions:

1. Discuss a variety of financial assistance/educational benefits issues with students; inform students of Federal, State, institutional financial assistance/educational benefits regulations and procedures.
2. Advise students on registration procedures related to financial assistance/educational benefits and scholarship programs with the college.
3. Advise student on Federal financial assistance/educational benefits satisfactory progress policies and procedures to maintain eligibility; advise students on repayment and collection procedures for financial assistance/educational benefits programs, student loans and scholarships.
4. Provide general information to students on college degree and certificate programs and transfers to four year institutions relative to eligibility for financial assistance/educational benefits and scholarship programs.
5. Interpret and explain regulations, rules, and policies relative to maintaining eligibility for financial assistance/educational benefits and scholarship programs.
6. Coordinate financial assistance/educational benefits and scholarship programs as directed.
7. Perform all technical and clerical tasks and procedures to process student's award/certification status for financial assistance/educational benefits and scholarship programs.
8. Perform all computer data entry (i.e., tracking, packaging, awarding, certification, etc...) and analysis as required to maintain student's eligibility status.
9. Identify, request and process all documentation needed to determine and maintain student's eligibility status.

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Financial Assistance Advisor (continued)

10. Route and maintain all documentation and records as federally regulated.
11. Serve as the college liaison in the process of financial assistance/educational benefits and scholarship programs.
12. Conduct student orientation as needed for financial assistance/educational benefits and scholarship programs.
13. Reconcile all individual students' eligibility and certification status relative to federal, state and institutional financial assistance/educational benefits and scholarships program.

14. Research, understand and monitor complex Federal and State regulations regarding the financial assistance/educational benefits programs administered by the department.
15. Provide office supervision if directed to student workers.

Marginal Functions:

1. Produce a variety of computer generated reports and provide a statistical data to the Director as needed.
2. Perform related duties and responsibilities as required.

QUALIFICATIONS

Knowledge of:

Federal, State and local financial aid laws, policies, programs and regulations
VA State approving agency regulations
Federal Title IV Financial Aid regulations
Private Scholarship programs
Veterans Administration (VA) regulations, rules and policies relative to educational benefits eligibility and certification by the college
Basic VA eligibility and certification
Methods and techniques of interviewing and advising
Modern office procedures, methods and equipment including computer
Principles and procedures of record keeping
English usage, spelling, grammar and punctuation
Basic mathematic and accounting principles
Principles of basic report preparation

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Ability to:

Interpret and explain financial aid federal/state regulations and rules including Veterans Educational Benefits program.
Assist and advise students on obtaining and maintaining eligibility.
Advise students on financial assistance/educational benefits programs and application process.
Deal with students of various backgrounds under stressful conditions.
Analyze and interpret financial assistance/educational benefits data.
Operate office equipment including computers and supporting word processing and other software applications.
Maintain computer database and perform data entry.
Maintain accurate records and files.
Prepare a variety of clear and concise reports and forms.
Deliver presentation on financial assistance/educational benefits and scholarship programs.
Respond to requests and inquiries from the general public.
Work independently in the absence of supervision.
Communicate clearly and concisely, both orally and in writing.
Maintain physical condition appropriate to the performance of assigned duties and responsibilities.

Experience and Training Guidelines

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

Experience:

Three years of increasing responsible experience in student financial assistance/educational benefits and scholarships programs, reviewing, analyzing and related computerized software systems.

Training:

Equivalent to the completion of the twelfth grade supplemented by college level course work in finance, business administration or a related field.

WORKING CONDITIONS

Environmental Conditions:

Office environment, exposure to computer screens.

Physical Conditions:

Essential and marginal functions may require maintaining physical condition necessary for sitting for prolonged periods of time.

5/17/06