



## FINANCIAL AID ADVISOR

<b>Reports to:</b>	Director, Financial Aid & Scholarships		
<b>Dept:</b>	Financial Aid	<b>Range:</b>	23
<b>FLSA:</b>	Nonexempt	<b>EEO:</b>	Technician and Paraprofessional

*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 duties performed by individual positions.*

### **BASIC FUNCTION:**

Under general supervision, perform specialized journey-level technical duties in support of financial aid programs and services; receive, analyze and validate financial aid applications; perform needs analyses, determine eligibility and package awards in accordance with district policies and federal, state and local requirements; determine status of financial aid funds including overpayments; monitor and reconcile Federal Work Study program expenditures; and perform related duties as assigned.

### **DISTINGUISHING CHARACTERISTICS:**

A Financial Aid Advisor is distinguished from a Financial Aid Assistant in that an incumbent in the former class is responsible for more complex technical decisions, use of State/Department of Education legislation and interpretation of complex legislation policies and procedures requiring advanced technical knowledge and experience gained through professional education and specialized experience.

### **ESSENTIAL DUTIES & 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. Exhibit an equity-minded focus, responsiveness, and sensitivity to and understanding of the diverse academic, socioeconomic, cultural, gender identity, sexual orientation, and ethnic backgrounds of community college students, and employees, including those with physical or learning disabilities, and successfully foster and support an inclusive educational environment.
2. Analyze financial data, family circumstances, household size, and educational goals when advising students of federal, state, and district regulations and policies for determining eligibility. Evaluate financial aid needs using standard federal formulas for all available programs to determine Expected Family Contribution (EFC)/Student Aid Index (SAI) in each case. Assign student budgets for packaging financial aid and scholarships; ensure students receive the correct amount of aid awarded based on their Cost of Attendance; revise

---

budgets as required based on changes in students' personal circumstances or attendance schedules.

3. Serve as functional lead for the student financial aid application and verification tracking systems; make recommendations regarding system modifications to improve functionality and ease of student experience; monitor transactions for fraudulent activity; review third-party software applications and perform actions needed to process student refunds or determine eligibility for refunds.
4. Manage, coordinate and lead assigned major financial aid programs for the district; master the detailed technical knowledge and procedural requirements of each assigned program to become the program's in-house expert; consult with state and federal agencies for assistance with regulations and procedures for resolutions as needed; implement new programs established by the California Student Aid Commission (CSAC) in a timely manner.
5. Act as the steward for financial aid funds; review student enrollment status, monthly enrollment changes and programs of study; communicate with faculty on student engagement to determine and process overpayments, Return to Title IV funds (R2T4) and post-withdrawal disbursements; research individual courses taken as repeats and determine whether to adjust student enrollment status for payment based on Retaking Coursework rules; coordinate with external colleges and universities to resolve financial aid funding issues.
6. Evaluate special circumstance appeals, applying sound, technical judgement; address exceptional circumstances and effect any changes in EFC/SAI based on decisions made. Adjust student financial aid awards based on adjustments made to student's FAFSA or CADAA.
7. Monitor student progress for compliance with Satisfactory Academic Progress (SAP) Plans to ensure continuation of aid; apply MiraCosta College Satisfactory Academic Progress policy to comply with federal rules; identify and advise students in resolving academic progress issues that may affect aid; process financial aid appeals by reviewing and validating supporting documentation of extenuating circumstances; analyze student academic transcripts; act as a liaison with academic counselors to ensure student's educational plan is up to date.
8. Research, review, interpret, apply and maintain detailed knowledge of Title IV federal and California education rules, policies and procedures governing student financial aid and programs.
9. Conduct comprehensive audits of student financial aid files to verify completeness, accuracy and timeliness of all information and documentation supporting a student's financial aid status; identify and assist in resolving compliance issues for required procedural or regulatory reporting, filing or submission.
10. Develop and coordinate financial aid outreach events at local high schools and within the campus community; act as the Financial Aid Liaison and serve as the primary point of

---

contact for an assigned cohort of students within the Academic Career Pathways (ACP) and the ACP Case Management team; prepare cross-training materials for staff on financial aid processes, policies, and procedures.

11. Counsel and advise individual students and families on financial aid literacy, debt management, awarding procedures, eligibility requirements, application and verification deadlines, and applicable appeal processes as needed.
12. Provide technical assistance to students, parents and staff on all aspects of financial aid.

**OTHER DUTIES:**

1. Conduct complex verification pertaining to student financial aid eligibility forms.
2. Maintain current knowledge of federal and state laws, local and campus regulations, policies and guidelines that affect programs and application processing and eligibility requirements; attend workshops, conferences and other training sessions involving financial aid as assigned.
3. Create, develop, maintain, and update specialized and custom forms, databases, logs, files, records, reports, and queries; design, develop, analyze, and maintain spreadsheets and databases requiring data interpretation and manipulation.
4. Develop and deliver organized and comprehensive oral presentations on financial aid during outreach and campus events. Provide hands-on assistance and expert knowledge with completing federal and state financial aid applications (FAFSA and CADAA).
5. Provide backup to other staff in the department as needed.
6. Perform related duties as assigned.

**KNOWLEDGE AND ABILITIES:****KNOWLEDGE OF:**

1. Personal and financial issues/special circumstances of disadvantaged students.
2. Federal, state and local financial aid programs and regulations, including expert knowledge of Federal Student Aid Handbook, California Student Aid Commission Cal Grant Handbook, and Department of Education Federal Register.
3. Policies, objectives and technical aspects of financial aid programs and activities.
4. Financial and statistical recordkeeping techniques.
5. Advanced skills in research methods and procedures.
6. Applicable sections of the state education code.
7. Interpersonal skills using tact, patience and courtesy.
8. Interviewing, counseling, and advising techniques.

9. Report preparation.
10. Telephone techniques and etiquette.
11. District organization, functions, rules, policies, and procedures applicable to assigned areas of responsibility.
12. Safety policies and safe work practices applicable to the work.
13. Written and oral communication skills including correct English usage, grammar, spelling, punctuation, and vocabulary.

**ABILITY TO:**

1. Exercise sound judgment in reviewing student financial aid applications.
2. Perform complex journey-level technical and analytical duties in support of financial aid programs and services.
3. Recognize, investigate, and determine possible fraudulent activity within student financial aid applications (FAFSAA/CADAA) and verification documents including loan requests and BankMobile disbursements.
4. Assist with planning and organizing financial aid programs and services.
5. Interpret, apply and explain rules, regulations, policies and procedures and apply them in a variety of procedural situations.
6. Operate a computer and use PeopleSoft, CampusLogic, WorkDay, WebGrants, BankMobile, EDConnect, COD, NSLDS, FAA Access and other business software.
7. Work independently with little direction and confidentially with discretion.
8. Plan and organize work.
9. Meet schedules and timelines.
10. Train and provide work direction to others.
11. Analyze situations accurately and adopt effective courses of action.
12. Establish priorities and work effectively with many demands on time.
13. Resolve conflicts and solve problems.
14. Communicate effectively, both orally and in writing.
15. Understand and follow written and oral instructions.
16. Demonstrate sensitivity to and understanding of diverse academic, socioeconomic, cultural, ethnic and disability issues.
17. Establish and maintain effective working relationships with all those encountered in the course of work.

**EDUCATION AND EXPERIENCE:**

Graduation from an associate degree program, and at least two years of progressively responsible experience involving admissions, student records and/or financial aid processes; or an equivalent combination of training and experience.

**LICENSES AND OTHER REQUIREMENTS:**

A valid California driver's license and the ability to maintain insurability under the district's vehicle insurance program.

**WORK DIRECTION, LEAD AND SUPERVISORY RESPONSIBILITIES:**

Work direction and technical information to Administrative Support Assistant III, Financial Aid Assistant, student workers, and temporary workers, as assigned.

**CONTACTS:**

District administrators, faculty, staff, students, other college and community organizations, vendors, contractors and the general public.

**PHYSICAL EFFORT:**

*The physical efforts described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

Primarily sedentary with intermittent standing, walking, bending and stooping; occasional light lifting and carrying of objects weighing up to 20 pounds; ability to travel to various locations on and off campus as needed to conduct district business.

**EMOTIONAL EFFORT:**

Ability to develop and maintain effective working relationships involving interactions and communications personally, by phone and in writing with a variety of individuals and/or groups from diverse backgrounds on a regular, ongoing basis; ability to work effectively under pressure on a variety of tasks concurrently while meeting established deadlines and changing priorities.

**WORKING CONDITIONS:**

Primarily business office environment; subject to frequent public contact and interruption and intermittent exposure to individuals acting in a disagreeable fashion. Occasional evening, week-end and/or holiday hours are required on an as-needed basis.