

CHABOT-LAS POSITAS COMMUNITY COLLEGE DISTRICT

FINANCIAL AID ADVISOR III

*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 within the job.*

SUMMARY DESCRIPTION

Under direction, perform a wide variety of mandated financial aid accounting duties in the Financial Aid Office to address vital federal and state compliance issues; perform a variety of complex duties involved in providing financial aid services and recommending available alternatives for students; process and verify student financial aid applications; and develop and award student financial aid packages in accordance with prescribed policies, procedures, regulations and guidelines; exercise professional judgment to determine whether adjustments should be made regarding student eligibility; and investigate, analyze information, and solve problems with students and campus and external entities.

DISTINGUISHING CHARACTERISTICS

This class is responsible for a variety of mandated financial aid accounting duties. Positions at this level are distinguished from other classes within the series by performing duties that include complex and varied tasks and require a moderately high degree of independent judgment to address vital federal and state compliance issues. Incumbents in this class also have broad knowledge of Financial Aid programs and are able to perform the duties assigned to lower levels classifications in the series. Employees at this level are required to be fully trained in all procedures related to assigned area of responsibility.

REPRESENTATIVE DUTIES

The following duties are typical for this classification. Incumbents may not perform all of the listed duties and/or may be required to perform additional or different duties from those set forth below to address business needs and changing business practices.

1. Oversee the Return to Title IV program for students who withdraw after having received financial aid; ensure adherence to Federal guidelines and strict timetables; coordinate all required activity between the Financial Aid Office, students, and the Department of Education.
2. Reconcile Federal Pell Grant, FSEOG, FWS, and state Cal Grant programs between Financial Aid Office records and finance; identify and determine causes of discrepancies in need of correction.
3. Assist students in resolving financial aid overpayments; report overpayments to the Department of Education.
4. Monitor outstanding financial aid checks, postings of SFA-related journal entries, repayments of emergency loans, and COTOP.
5. Oversee financial aid fund stop payments and reissued check requests through completion of process.
6. Maintain a "hold" list of financial aid checks awaiting Financial Aid Office approval for release.
7. Prepare related state, federal and District reports; resolve discrepancies and maintain records.
8. Interpret District, state, and federal regulations and policies to provide information and services to students and staff.

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9. Review and evaluate files to ensure compliance; evaluate students academic progress and advise students of subsequent options.
10. Determine student eligibility for financial aid based on program criteria; award financial aid packages; determine and report actual disbursements.
11. Develop forms, handouts, and consumer information materials.
12. Perform related duties as required.

MINIMUM QUALIFICATIONS

The following generally describes the knowledge and ability required to enter the job and/or be learned within a short period of time in order to successfully perform the assigned duties.

Knowledge of:

1. Federal, state, and District regulations, policies, and procedures related to financial aid accounting.
2. Student financial aid processes and procedures including federal, state, and local laws, policies, procedures, rules and regulations pertaining to student financial aid, grants, and loans.
3. Advanced methods and techniques of advising students regarding financial aid options and programs.
4. Office procedures, methods, and equipment including computers and applicable software applications such as word processing, spreadsheets, and databases.
5. Principles of business letter writing and basic report preparation.
6. Principles and procedures of record keeping.
7. Effective oral and written communication skills.
8. English usage, spelling, grammar and punctuation.

Ability to:

1. Remain current with present and pending financial aid accounting regulations, policies, and procedures as well as federal and state legislation.
2. Interpret and apply District procedures and policies pertaining to financial aid.
3. Determine eligibility of students for financial assistance through analysis and interpretation of data and guidelines.
4. Adhere to strict deadlines to ensure the District is in compliance.
5. Analyze situations accurately and adopt an effective course of action.
6. Independently prepare routine correspondence and memoranda.
7. Research regulatory information and resolve complex financial aid questions, to investigate, analyze information and draw conclusions.
8. Exercise good judgment and maintain confidentiality regarding critical and sensitive information, records, and reports.
9. Diffuse difficult, angry, or emotional situations with students and/or parents.
10. Plan, organize and prioritize work in order to meet schedules and timelines.
11. Prepare a variety of comprehensive and statistical reports.
12. Operate office equipment including computers and supporting word processing, spreadsheet, and database applications.
13. Enter, modify, and retrieve data using a computer at a speed necessary for successful job performance.
14. Respond to difficult inquiries and requests from students regarding financial aid options and

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programs.

15. Communicate clearly and concisely, both orally and in writing.
16. Establish and maintain effective working relationships with those contacted in the course of work.
17. Work with and exhibit sensitivity to and understanding of the varied racial, ethnic, cultural, sexual orientation, academic, socio-economic, and disabled populations of community college students.

Minimum Education & Experience - Any combination of the following would provide a typical way to obtain the required knowledge and abilities.

Education/Training:

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

Experience:

Four years of experience including two years of experience performing duties comparable to a Financial Aid Advisor II with the Chabot-Las Positas Community College District.

PHYSICAL DEMANDS AND WORKING ENVIRONMENT

The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.

Environment: Work is performed primarily in a standard office setting with frequent student and public contact.

Physical: Primary functions require sufficient physical ability and mobility to work in an office setting; to stand or sit for prolonged periods of time; to occasionally stoop, bend, kneel, crouch, reach, and twist; to lift, carry, push, and/or pull light to moderate amounts of weight; to operate office equipment requiring repetitive hand movement and fine coordination including use of a computer keyboard; and to verbally communicate to exchange information.

Adopted by Board of Trustees on October 20, 2015

Effective: October 21, 2015

Job Family: Technical – Paraprofessional