



TITLE: FINANCIAL AID ADVISOR

SUPERVISOR: SENIOR FINANCIAL AID MANAGER

DEPARTMENT: FINANCIAL AID

PRIMARY OBJECTIVE: The Financial Aid Advisor, under the direction of the Financial Aid Senior Financial Aid Manager, provides financial aid services to potential students. The Financial Aid Advisor will conduct student need analysis, perform federal verifications and packaging of student aid, certify federal loan eligibility, provide financial aid counseling, make professional judgment decisions regarding student aid eligibility and facilitate problem solving with students and parents. Incumbents in this job classification will interact with specific outside agencies to facilitate the student eligibility process and he/she is accountable for ensuring compliance with federal regulations.

EDUCATION AND TRAINING: MINIMUM QUALIFICATIONS: Demonstrated experience in student financial aid directly related to financial aid counseling, eligibility determination, need analysis, verification and packaging required. Experience with personal computers and on-line data systems required.

ESSENTIAL DUTIES AND RESPONSIBILITIES: (Includes some or all of the following)

- Conducts needs analysis in compliance with federal criteria to determine the relative eligibility of each financial aid applicant.
- Conducts verification of student and parent application data in compliance with federal criteria.
- Determines the types and amounts of financial aid to be awarded through the packaging process according to federal, state and institutional requirements. Monitors individual student awards. Resolves data conflicts and over awards.
- Works with Financial Aid Manager on individual student appeals concerning eligibility. Utilizes professional judgment to adjust a student's eligibility based on documented mitigating circumstances in accordance with federal statutes. May refer complex eligibility situations to the Financial Aid Manager.
- Provides financial aid counseling to students and parents regarding all aspects of financial aid process. Makes necessary referrals to other student service offices.
- Provides support to students experiencing family, personal or economic crises which may impact school performance. Specific focus on working with special needs populations to identify unique needs and coordinate appropriate services..
- Interacts with appropriate outside entities in order to facilitate the student eligibility process.
- Maintains appropriate documentation via data entry system.
- Participates in annual training and professional organizations to keep abreast of new information and program changes to be implemented.
- Performs other duties as assigned.

KNOWLEDGE, SKILLS AND ABILITIES (PREFERABLE):

- Working knowledge of federal financial aid programs and supporting regulations.
- Working knowledge of Title IV program fund regulations.
- Working knowledge of U.S. Department of Education rules and regulations.

- Working knowledge of current tax forms, regulations and the implications of such regulations on financial aid.
- Skill in researching regulatory information and resolving complex financial questions.
- Skill in operating a computer and various supporting software packages.
- Skill in computing complex mathematical formulas.
- Ability to defuse difficult, angry, or emotional situations with students and/or parents.
- Ability to prioritize and manage a significant caseload.
- Ability to operate a variety of office equipment.
- Ability to interpret and explain regulatory information related to the financial aid process.
- Ability to work independently.
- Ability to effectively communicate in oral and written form.