



POSITION DESCRIPTION

Department: Financial Aid & Scholarships
Working Title: Financial Aid Advisor
Job Code: 3082
Time Base: 1.0
Position Number: 00004844
Union / Unit (if applicable): Academic Professionals of California / Unit 4

Position Reports To: Director, Financial Aid & Scholarships
Classification: Student Services Professional II
Range Code: 1
Exempt or Non-Exempt: Exempt
Last Update: 2/27/23

PURPOSE OF POSITION:

This position reports to the Lead Financial Aid Advisor for Financial Aid Client Services and to the Director of Financial Aid & Scholarships. This position is a hybrid position; on campus and remote. As a member of the Financial Aid & Scholarships Office in Enrollment Management Services (EMS), the Financial Aid Advisor independently reviews, analyzes and revises student financial aid application data based on verification documents and change of circumstance appeals; calculates, awards and revises aid eligibility. Serves as the primary lead and performs program coordination and reconciliation or administrative responsibilities related to a specific student aid programs including one or more of the following: Federal Pell Grant, Federal Direct Loan Programs, Cal Grant Programs, State University Grant, SEOG, Teach Grant, Federal Work-Study or Return of Title IV Funds. Facilitates financial aid services to targeted student populations, such as EOP, CAMP, foster youth, teaching credential students, etc. Under the general direction of the Director of Financial Aid & Scholarships, provides on-campus and off-campus outreach and student counseling; advises students and parents, particularly those with difficult circumstances. Coordinates aid awards from other offices and agencies. This position is responsible for independently handling the most difficult and complex financial aid cases.

MAJOR RESPONSIBILITIES:

	<u>%OF TIME</u>
Financial aid Analysis and Advising	50%
Program Lead & Coordination /Special Populations	30%
Outreach and student counseling	20%

LIST OF DUTIES FOR EACH MAJOR RESPONSIBILITY:

1. **Financial aid Analysis and Advising**
 - Following complex federal regulations and CSUSM policies and procedures, reviews and analyzes financial aid applications, checking for accuracy and consistency; revises awards, and reviews change of circumstance appeals; determining adequate documentation, follows up for further information and/or makes assumptions to complete review and any change to award.
 - Conducts all required verification processes, contacting students and parents as needed for advising and interpretation.
 - Provides coordination with other offices and agencies that deal with FAS Office, including revising awards based on funding from those sources.
 - Certifies student loans and corrects information utilizing the financial aid management systems (CMS Peoplesoft) to reflect changed awards.
 - Must thoroughly understand federal regulations and CSUSM policies and procedures but exercise considerable independent judgment. For complicated cases, follows up for further information and/or makes decision using experience and judgment to complete analysis and award.
 - Provides support and coaching to the financial aid customer service team and advises students and parents with complex questions and concerns. Uses sound judgment to recommend solutions to problems and changes in program procedures. Assists with the maintenance of an office Policy & Procedures Manual.
 - Reviews awards following add/drop to make necessary changes to financial aid based upon the number of units a student is actually taking. Also revises awards based on other changes to eligibility. Coordinates with appropriate offices as required.

2. **Program Lead & Coordination/ Special Populations**

- Serve as the primary lead and in-house expert relative to a specific student aid program or student population. Perform program coordination responsibilities related to a specific aid program (e.g. Return of Title IV Funds, Cal Grants, Pell, Federal Direct Loans) or to facilitate the delivery of financial aid services to a targeted population such as EOP, CAMP, foster youth or teaching credential and graduate students. This may include special group presentation and one-on-one advising.
- Serves as member of Financial Advising Team to reconcile one or more of the following: Federal Pell Grant, Federal Direct Loan, Cal Grant, State University Grant, SEOG and Federal Work-Study. Reviews weekly and monthly reports to ensure accurate reporting to and from external entities.
- Ensures student eligibility and campus eligibility requirements are met; alerts supervisor of needed program or system changes; ensures compliance.
- Completes end-of-year reconciliation to confirm all eligible students awarded appropriately and funds from agencies received. Ensures accuracy and completeness of all data. Works directly with external entities such as the California Student Aid Commission and the Department of Education to resolve issues.

3. **Outreach and Student Counseling**

- Serves as the primary representative for on and off campus financial aid presentations requests. Conducts and provides requests to the FA&S team for on and off-campus presentations and financial aid workshops.
- Works collaboratively across departmental and functional lines to ensure financial aid services meet the needs of various student populations, promote the recruitment and retention of students, and to equitably distribute limited federal, state, and institutional student aid resources.
- Counsels students and meets regularly with students and parents regarding financial aid concerns, advises on matters that impact eligibility, and maintains confidentiality. Explains the basis for recommendations, decisions or actions.
- Counsels upset students and assists with more complex situations and concerns. Often deals with highly sensitive and emotionally charged issues.
- Participates on committees and performs related duties as required.

PRVIDES LEAD DIRECTION OF OTHERS:

- Lead and provide work direction to student employees; assist in the training of Quality Service Representatives and Student Personnel Technician.

REQUIREMENTS OF POSITION:

1. **List certificates, licenses, or education required**

- Bachelor's degree required from a four-year college or university in one of the behavioral sciences, public or business administration or a job-related field; or an equivalent combination of education and experience.
- Minimum 2 years professional experience in one of the student services program areas or in a related field; experience should give evidence of competence and indicate the potential for further growth.
- A Master's degree in behavioral science or related field may be substituted for year of the professional experience.
- Must possess a valid California driver's license and automobile insurance; a California State University defensive driving course must be passed upon acceptance of the position.

2. **List additional knowledge, skills, and abilities required for this position.**

- Knowledge and experience with financial aid regulations and federal needs analysis required, since work involves financial aid file review, award revision and financial aid program coordination.
- General knowledge of the methods and problems of organizational and program management.
- General knowledge of research and interview techniques.
- General knowledge of the principles of individual and group behavior.
- Ability to interpret and apply program rules and regulations.
- Experience using initiative and resourcefulness in planning work assignments and in implementing long-range program improvements.
- Experience collecting, compiling, analyzing and evaluating data and make verbal or written presentations based on these data; experience advising students individually and in groups on routine matters where required.
- Strong analytical skills essential.
- Demonstrated ability to gather factual and interpretive information and recognize discrepant data through the review and analysis of forms and documentation.
- Ability to rapidly acquire a general knowledge of the overall operation, functions and programs of CSU San Marcos.
- Demonstrated ability to make decisions and carry through actions having implications with regard to other program or service areas.
- Program coordination and planning skills to support partnerships.
- Excellent verbal communication skills; public speaking ability required for outreach efforts

- Strong counseling skills given the complex nature of financial aid and counseling issues.
 - Proven writing and editing skills must include: letters with students and agencies, brochures, reports, and memorandums.
 - Due to constantly shifting workload, must be well organized, with the ability to prioritize multiple tasks.
 - Demonstrated ability to reason logically and apply sound judgment when exercising professional judgment in cases where precedent may not exist.
 - Demonstrated ability to work independently and make decisions with minimal supervision or direction.
 - Demonstrated ability to use initiative and resourcefulness in planning work assignments and in implementing long-range program improvements
 - Detailed knowledge of financial aid needs analysis required.
 - Proficiency in computer applications; knowledge of MS Word.
 - Proficiency in financial aid database programs; knowledge of PeopleSoft system strongly preferred.
 - Ability to demonstrate an awareness and appreciation of the cultural diversity of the University community, and establish and maintain cooperative and effective relations with the University employees, students and the public.
 - Demonstrated ability to use high level of judgment in independently developing solutions to complex problems.
 - Strong problem resolution skills.
 - Ability to handle large volume of work; ability to work under pressure and meet deadlines as required.
 - Ability to recognize multicultural, multisexed, and multi-aged value systems and work accordingly.
 - Ability to establish and maintain cooperative working relationships with faculty, CSU administrators, student organizations, private and public agencies and others in committee work, and student advising and community contacts.
 - Ability to interpret, apply, and explain complex policies, procedures, regulations.
3. **List machines, tools, equipment, and motor vehicles used in the performance of the duties**
- Standard office and communications equipment
4. **Unique working conditions**
- Sitting at desk, working on computer most of day
 - This position requires some evening and weekend hours during peak processing periods and to attend outreach events on and off campus.
 - During peak revision times, some repetitive keyboard motions
5. **Other Employment Requirements**
- This position is subject to a background check including, but not limited to, employment verification, education verification, reference checks and criminal record checks. Failure to satisfactorily complete the background check may affect the application status of applicants or continued employment of current CSU employees who apply for the position.
 - The person holding this position is considered a ‘mandated reporter’ under the California Child Abuse and Neglect Reporting Act and is required to comply with the requirements set forth in CSU Executive Order 1083 as a condition of employment.
 - Must participate in required campus trainings including, but not limited to, Information Security Awareness Training and Sexual Violence Prevention (Title IX) training.

PURPOSE AND NATURE OF WORK RELATIONSHIPS:

Define working relationships with people on and off campus (other than supervisor or people supervised) with whom this employee interacts on a continuing basis, and how often this interaction occurs.

Admissions & Recruitment	Student Eligibility and status	Daily
Global Affairs Office	Working with students in Study Abroad programs	Daily
Chancellor’s IP Office	Working with students admitted to IP program	Monthly
Dept. of Education	Pell Grant processing and reconciliation	Weekly
Students and Parents	Provide Financial Aid information	Daily
Cashiers	Aid disbursements	Weekly
Financial Aid Accounting	Resolve financial matters, aid disbursements	Weekly
Registration and Records	Grade level verifications	Weekly
California Student Aid Commission	Cal Grant awarding and reconciliation	Monthly
VPSA Office	Student issues and complaints	Daily
Student Residential Life	Orientation and workshops	Daily
SSS/EOP	Student eligibility, status and awards	Daily
Counseling & Psychological Services	Students needing referral assistance	Daily
Disabled Student Services	Students needing referral assistance	Daily
Student Health Services	Students needing referral assistance	Daily
External Affairs	Scholarship coordination	Daily
Foundation	scholarship coordination	Daily

PHYSICAL EFFORT:

Check the appropriate box for each of the following items which most accurately describes the extent of the specific activity performed by this employee on a daily basis.

	Number of hours/day				
	N/A	1-2	3-4	5-6	7+
1. Sitting					X
2. Standing		X			
3. Walking	X				
4. Bending Over	X				
5. Crawling	X				
6. Climbing	X				
7. Reaching overhead	X				
8. Crouching	X				
9. Kneeling	X				
10. Balancing	X				
11. Pushing or pulling	X				
16. Driving cars, trucks, forklifts and other equipment					
17. Being around scientific equipment and machinery					
18. Walking on uneven ground					

	Number of hours/day				
	N/A	1-2	3-4	5-6	7+
12. Lifting or carrying	X				
A. 10 lbs or less	X				
B. 11 to 25 lbs	X				
C. 26 to 50 lbs	X				
D. 51 to 75 lbs	X				
E. 76 to 100 lbs	X				
F. Over 100 lbs	X				
13. Repetitive use of hands/arms					X
14. Repetitive use of legs	X				
15. Eye/hand coordination	X				

Yes	No
X	
	X
	X

MENTAL EFFORT

	Number of hours/day				
	N/A	1-2	3-4	5-6	7+
1. Directing others	X				
2. Writing		X			
3. Using math/calculations				X	
4. Talking			X		
5. Working at various tempos	X				
6. Concentrating amid distractions					X
7. Remembering names	X				
8. Remembering details					X
9. Making decisions					X
10. Working rapidly					X
11. Examining/observing details					X
12. Discriminating colors	X				

ENVIRONMENTAL FACTORS

	Number of hours/day				
	N/A	1-2	3-4	5-6	7+
1. Inside					X
2. Outside	X				
3. Humid	X				
4. Hazards	X				
5. High places	X				
6. Hot	X				
7. Cold	X				
8. Dry	X				
9. Wet	X				
10. Change of temp	X				
11. Dirty	X				
12. Dusty	X				
13. Odors	X				
14. Noisy	X				
15. Working w/others		X			
16. Working around others					X
17. Working alone				X	

SIGNATURES

The last sheet for any staff position description should contain the signature sheet. Signatures will include the incumbent's signature (if applicable) or new employee; the supervisor's signature and all pertinent administrative personnel.

Employee

Print Name: _____

Signature: _____

Date: _____

Appropriate Administrator (MPP)

Print Name: _____

Signature: _____

Date: _____

Dean/Department Head/Director/AVP (optional)

Print Name: _____

Signature: _____

Date: _____