

**POSITION CLASS TITLE:**            **FINANCIAL AID ADVISOR**

**JURISDICTIONAL CLASS:**        Competitive

**CIVIL DIVISION:**                Schools

**AUTHORIZATION:**                Oswego County Personnel Officer

December 1994 (Revised 4/95, 11/08, 3/15, 8/18)

**POSITION CLASS DEFINITION:**

Essential nature of work, degree of difficulty and responsibility.

This is a professional-level position involving responsibility for advising and assisting adult education students with the application process for aid for tuition for CiTi courses.

The incumbent works with federal, state, and local agencies in coordinating aid disbursement and provides financial aid information and services to secondary students and the general public.

Supervision is not a responsibility of this position. Employee works under the general supervision of the Coordinator of Business Administration. The incumbent does related work as required.

**PRIMARY WORK ACTIVITIES:**

Typical activities characteristic of the class.

- Assists and advises adult education students in applying for financial aid;
- Conducts interviews for financial aid;
- Works with federal, state, and local agencies to coordinate aid disbursement;
- Processes aid forms, Pell Grants, student loans, and develops aid packages to assist the student;
- Maintains and develops individual student financial aid files;
- Develops and maintains procedural manual detailing the financial aid process;
- Prepares and distributes consumer and financial aid information to the general public, other agencies, and secondary students;
- Oversees student data for adult education and compiles data used in reports;
- Completes reports related to contracts, grant proposals, sources of financial aid, government programs, student data, etc., as needed;
- Works with third party funding sources including, but not limited to, serving as the organization's VA Certifying Official working with veterans to obtain and process aid;
- Creates and monitors payment plans for students;
- Prepares financial aid for students whose enrollment is terminated explaining their financial obligations to CiTi and to financial aid sources (i.e. Title IV, lenders);
- Prepares 1098 T tax forms and statement of account forms for students;
- Explores additional financial aid sources such as scholarships, grants, and private loans;
- Compiles budget information and monitors budgets for Special Aid programs;
- Assures compliance with federal and State Student Financial Aid Program requirements.

## **FINANCIAL AID ADVISOR (2751)**

### **KNOWLEDGE, SKILLS AND ABILITIES:**

Summary of full performance level characteristics.

GOOD KNOWLEDGE OF: federal and state student financial aid programs;

WORKING KNOWLEDGE OF: 30. community, state, and federal resources and programs; 71. interviewing techniques; 21. business arithmetic; computers;

ABILITY TO: 25. communicate effectively, both orally and in writing; advise clients in the area of financial aid; 21. be sensitive to the needs of others; 61. exercise good judgment; 49. develop and maintain effective working relationships; 110. obtain facts in a structured interview setting; understand and apply written procedures and regulations from both state and federal levels; work independently; set priorities.

### **MINIMUM QUALIFICATIONS:**

Education, specialized background, training and experience.

- A. Graduation from a regionally accredited or NYS registered college or university with a bachelor's degree in business administration, accounting or related field and one (1) year of professional experience in financial counseling, accounting or auditing; **OR**
- B. Graduation from a regionally accredited or NYS registered college or university with a bachelor's degree and two (2) years of professional experience in financial counseling, accounting or auditing; **OR**
- C. An equivalent combination of training and experience as defined by the limits of "A" and "B" above.